

Project Document Manager

Control Your Projects. Control Your Future.



PDM Guide

PDM Core User Guide

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PDM OVERVIEW

PDM Pro is a Windows Remote Application developed with the latest Internet Technology. It runs on the local computer as a native windows application, but connects to a remote web server for services and data. This provides the rich user interface of a windows application with the easy deployment and maintenance of a web application.

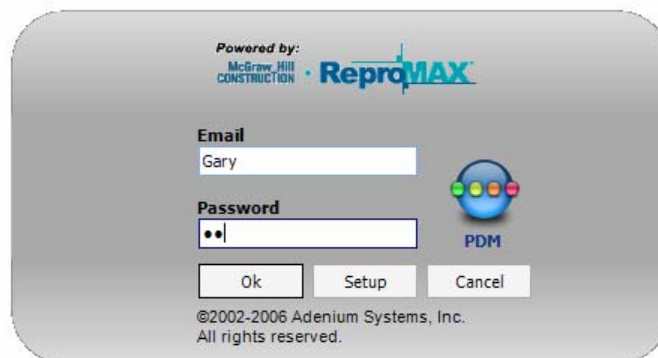
A user can access this application from any PC in the world. They simply have to connect to a special page or link we set up on their web site and click on the PDM button. PDM will then install the appropriate software on the PC each time it is executed.

PDM is an application that allows you to manage the way you communicate with other people on the project and also how you store, access, and distribute documents. PDM is a sophisticated tool that allows you to manage your documents, bid packages, contacts, notifications, reports and many other things related to your project.

Logging into PDM Pro

Click on the PDM icon on the desktop to launch open PDM.

Enter a valid **Email** and **Password** and click **OK**.

The image shows a login dialog box for PDM Pro. At the top, it says "Powered by: McGraw Hill CONSTRUCTION · ReproMAX". Below this, there are two input fields: "Email" with the text "Gary" and "Password" with two dots. To the right of the password field is a blue circular icon with a face and the text "PDM" below it. At the bottom, there are three buttons: "Ok", "Setup", and "Cancel". Below the buttons, it says "©2002-2006 Adenium Systems, Inc. All rights reserved."

When you login, PDM will open. A series of tabs will be listed across the top. The tabs are Projects, Contacts, Documents, Notifications, Bid Packages, My Account, and possibly some other custom tabs.

Projects Tab Overview

When the main window displays, the Projects tab is displayed and shows all of the projects that you have created and have been granted privilege to act as an administrator.

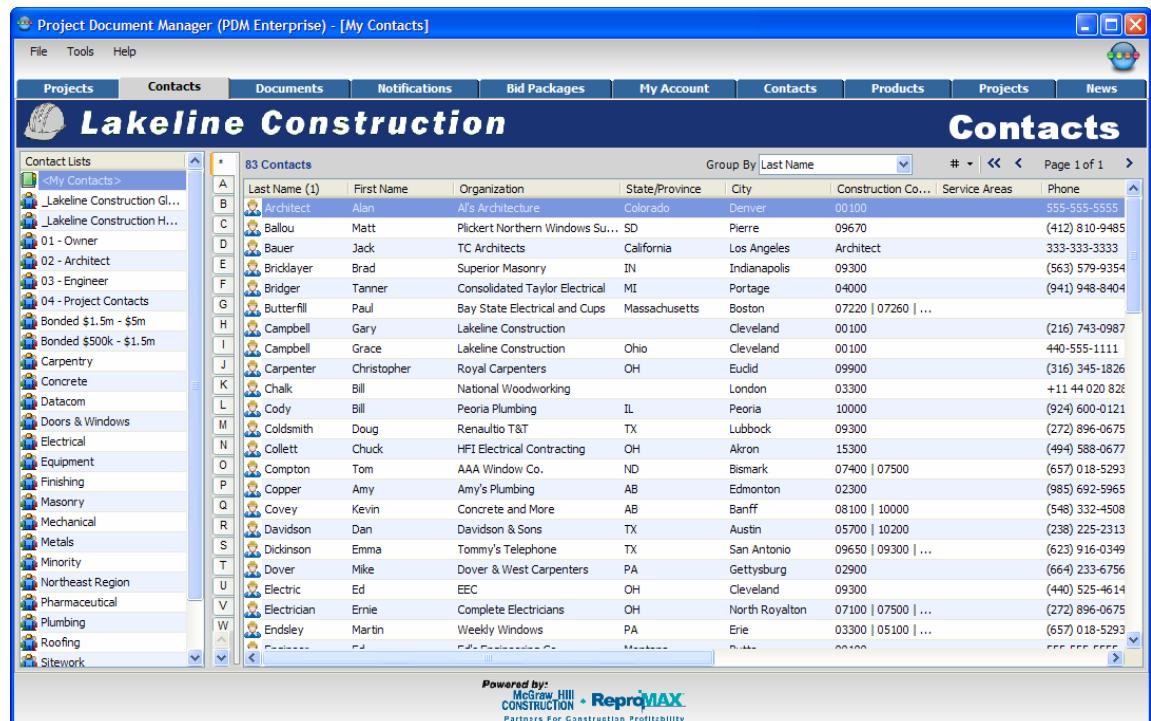
From this page you can monitor all projects in all phases and access detailed project information

Project	Bid Due Date	Portal	Description	Project Type	Status	Create Date	Release Date	Expire Date
Annsett High School - PDM	01/02/2007	Adenium Digital Repro Portal	This project is the new Ann...	Education Project	Active	04/26/2006		
Annsett Stadium	02/01/2007	Adenium Digital Repro Portal	Annsett Stadium Construction	Commercial Deve...	Active	01/01/2006	01/01/2007	01/01/2008
Annsett High School - Closeout Phase	01/02/2007	Lakeline Construction Portal	This project is the new Ann...	Education Project	Active	04/26/2006		
Annsett High School - Construction Phase	01/02/2007	Lakeline Construction Portal	This project is the new Ann...	Education Project	Active	04/26/2006		
Annsett High School - Design Phase	01/02/2007	Lakeline Construction Portal	This project is the new Ann...	Education Project	Active	04/26/2006		
Carson Clothing Store #5467		Lakeline Construction Portal	This is a remodel of the Car...	Retail Project	Active	04/26/2006		
Columbus Bobcats Stadium	02/16/2006	Lakeline Construction Portal	This project is the addition ...	Commercial Deve...	Active	04/26/2006		
Eastlake Municipal Airport		Lakeline Construction Portal	Eastlake Municipal Airport r...	Government Proj...	Active	04/26/2006		

Contacts Tab Overview

Click the **Contacts** tab.

The Contacts tab allows you to create a directory of all of your contacts. This can include architects, project managers, engineers, subcontractors, etc. You can store their name, company, address, service areas, phone numbers, construction codes and more.



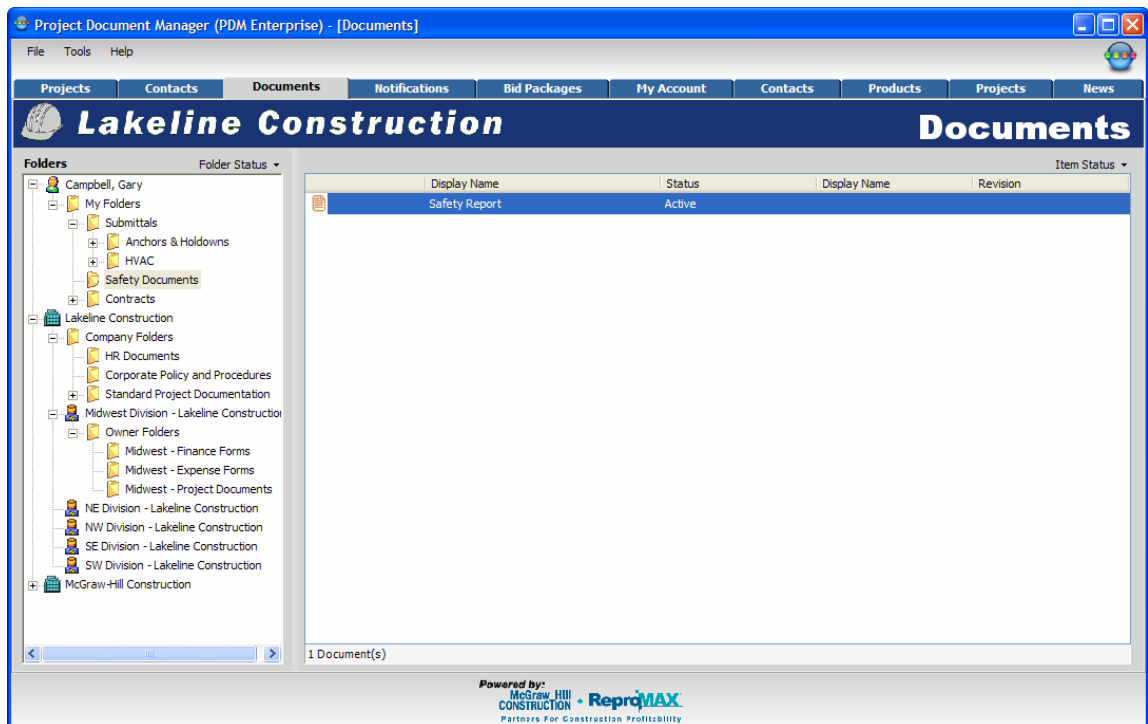
Note: PDM allows the subcontractors to be organized by construction codes that define the types of services they provide. Both CSI master formats are supported. MasterFormat 95 is the original specification containing an introduction and 16 divisions. Division 1 is critical because it provides an overview of the general requirements including a summary, administrative requirements and product requirements. CSI MasterFormat 04 was created to increase the divisions to 40.

PDM is capable of supporting MasterFormat 95 or MasterFormat 04 but not both at the same time.

Documents Tab Overview

Click the **Documents** tab.

The Documents tab allows you to manage and organize your own documents. PDM allows you to easily create a folder structure and then add documents to the folders. These documents are available from any computer connected to the web.



Notifications Tab Overview

Click the **Notifications** tab.

The notifications tab allows you to monitor and review all notifications that they have sent or received. It provides a quick method of reviewing the status of communications with project team members. This is particularly helpful when you are monitoring multiple Invitations-To-Bid that you have sent.

Project Document Manager (PDM Enterprise) - [Project Notifications]

File Tools Help

Projects Contacts Documents **Notifications** Bid Packages My Account Contacts Products Projects News

Lakeline Construction **Notifications**

Received Sent

Filter By Status

Notification	Project Name	Send Date	Status	# Recipients	# Replies	Type
Addenda 1 Notification	Annssett High School - ...	05/10/2006	Active	3	0	Addenda Notification
Annssett High School - ITB - DFS	Annssett High School - ...	12/05/2006	Active	1	1	Invitation to Bid - DFS
Annssett High School - Project Update - BMS	Annssett High School - ...	12/06/2006	Active	1	0	BMS Project Update Notification
Annssett High School Addenda Notification - BMS	Annssett High School - ...	12/06/2006	Active	1	0	BMS Addenda Notification
Annssett High School Notification of Bid Award	Annssett High School - ...	05/31/2006	Active	4	0	Notification of Bid Award
Annssett HS ITB - Rough Carpentry	Annssett High School - ...	11/29/2006	Active	1	0	Invitation to Bid - PDM
Annssett Invitation to Prequalify	Annssett High School - ...	05/24/2006	Active	4	0	Invitation to Prequalify
Concrete ITB	Annssett High School - ...	12/03/2006	Active	1	0	BMS Invitation to Bid
Invitation to Bid - Annssett - Concrete	Annssett High School - ...	12/03/2006	Active	1	0	BMS Invitation to Bid
Notification of RFI Answer	Annssett High School - ...	06/01/2006	Active	1	0	Notification of RFI Answer

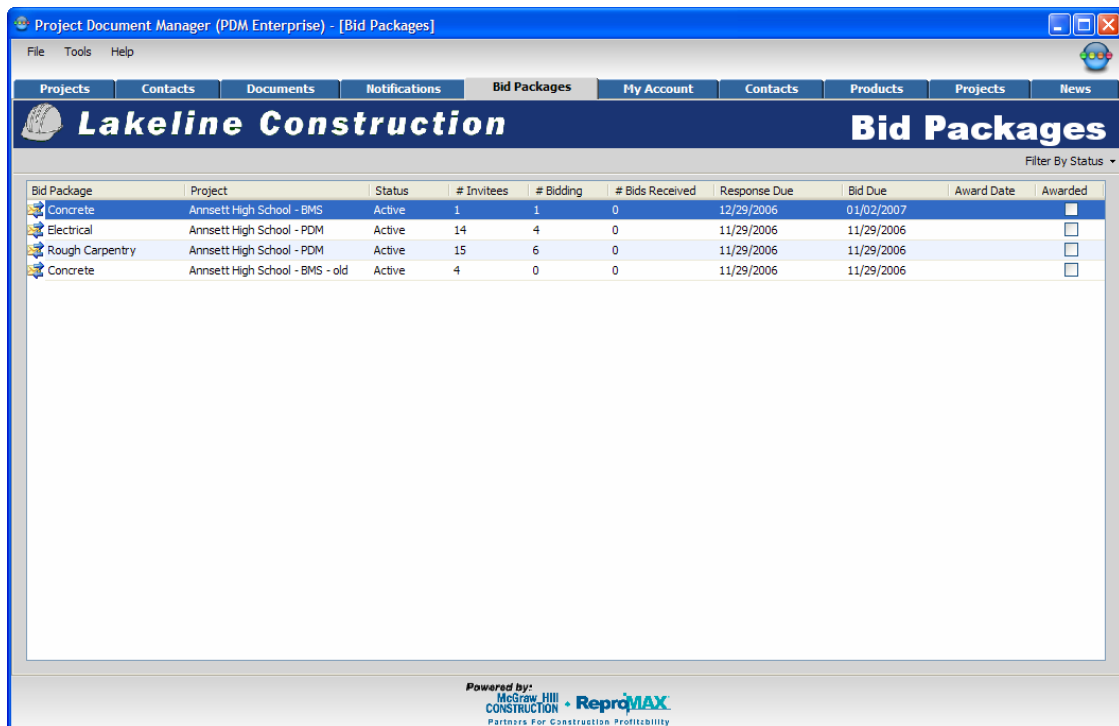
Powered by:
McGraw Hill
CONSTRUCTION
Partners For Construction Profitability

ReproMAX

Bid Packages Tab Overview

Click the **Bid Packages** tab.

The Bid Packages tab allows you to monitor all active bid packages for all projects. This allows you to quickly review the status of all bid packages or get detailed information for specific bid packages.



Bid Package	Project	Status	# Invitees	# Bidding	# Bids Received	Response Due	Bid Due	Award Date	Awarded
Concrete	Annsett High School - BMS	Active	1	1	0	12/29/2006	01/02/2007		☐
Electrical	Annsett High School - PDM	Active	14	4	0	11/29/2006	11/29/2006		☐
Rough Carpentry	Annsett High School - PDM	Active	15	6	0	11/29/2006	11/29/2006		☐
Concrete	Annsett High School - BMS - old	Active	4	0	0	11/29/2006	11/29/2006		☐

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My Account Tab Overview

Click the My Account tab.

The My Account tab allows you to enter your public and private contact information and notes.

The screenshot shows the 'Project Document Manager (PDM Enterprise) - [My Account]' window. The 'My Account' tab is selected, displaying a form for 'Lakeline Construction'. The form is divided into several sections:

- Organization:** Name (Lakeline Construction), Search, Edit, New buttons.
- Location:** Name (Headquarters - Cleveland Ohio (123 Main Street Cleveland 44115)), Edit, New buttons. A checkbox for 'Default Contact for Location' is present.
- Contact Information:** Fields for Prefix, First Name (Gary), Middle, Last Name (Campbell), Suffix, Display Name (Campbell, Gary), Title, Occupation (Constructor), Contact Email A (Duplicate Key) (garygc@adeniumdemos.com), Contact Method (Email), Contact Address 1 (34103 Lakeshore Blvd), Contact Work Phone ((216) 743-0987), Contact Address 2, Contact Mobile Phone ((216) 743-0988), Contact Country (US), Contact Fax ((216) 743-0984), Contact City (Cleveland), Contact Region, Contact Postal Code (44095), and Contact Time Zone.
- Contact Construction Codes:** A list of codes, currently showing '00100 - Bid Solicitation'.

At the bottom of the window, there is a logo for 'Powered by: Metrow Hill CONSTRUCTION • ReprqMAX' with the tagline 'Partners For Construction Profitability'.

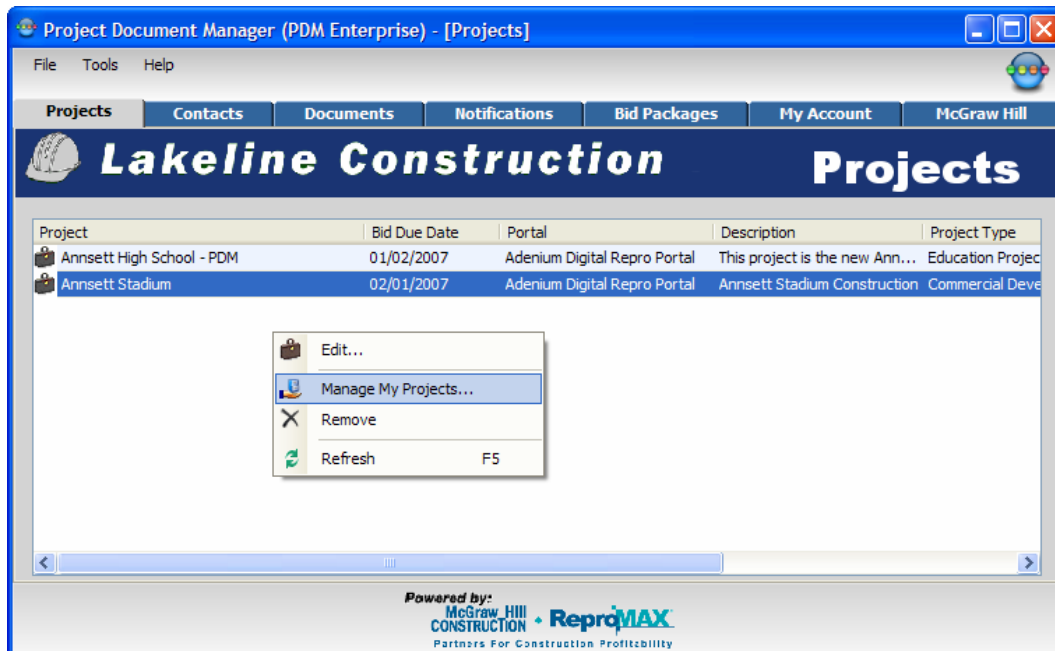
PROJECT MANAGEMENT

Creating a New Project

PDM allows you to manage your projects. You select the projects that you want to manage and display in your “Projects” tab. Each project contains a name, description, thumbnail, and attributes.

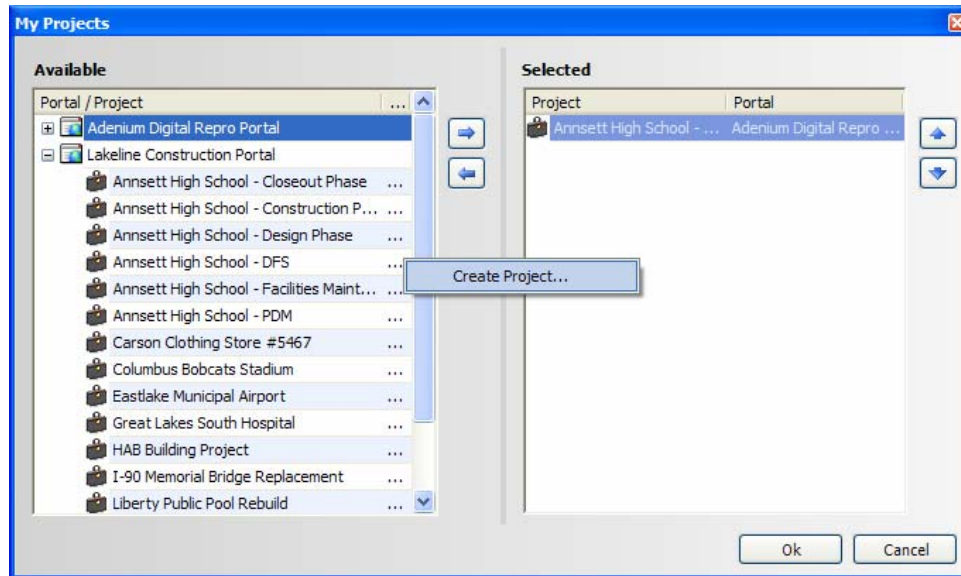
To create a new project, click the **Projects** tab.

Right click and select **Manage My Projects**.

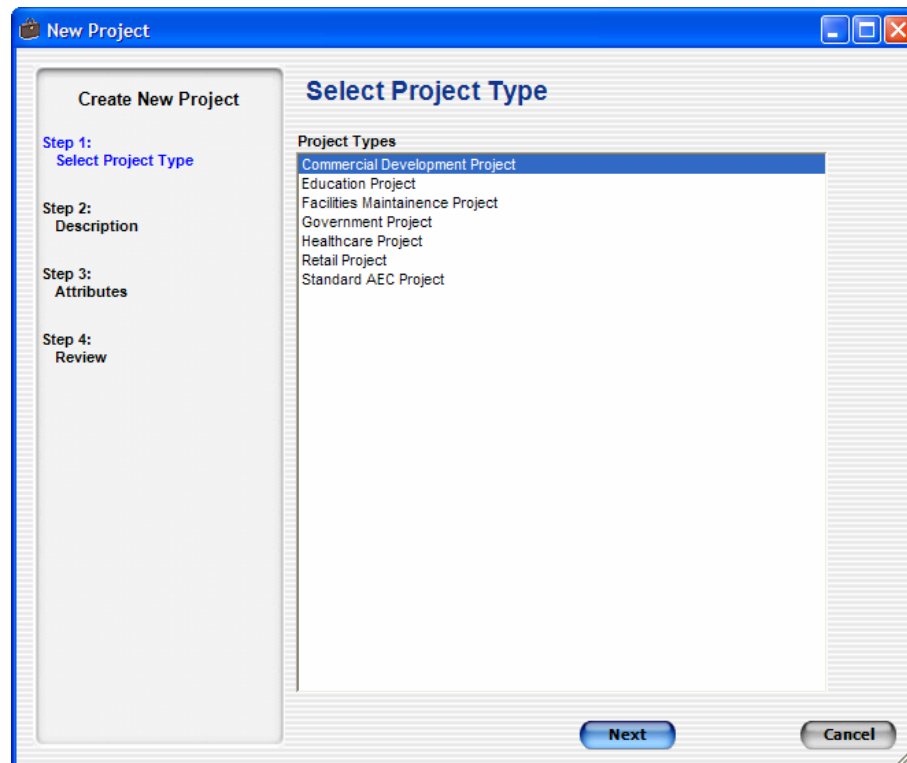


The project list will be displayed. On the left side is a list of all portals and the projects available on that portal.

In the **My Projects** window, select the portal in which you want to create the project, right click, and select **Create Project**.



The New Project wizard opens. It will walk you through the steps to create a project. Select the type of project it is from the **Project Type** list. Click **Next**.



Enter the **Project** information like **Display Name**, **Description**, **Status**, and **Default Print Location**. Click **Next**.

New Project

Create New Project

Step 1: Select Project Type

Step 2: **Description**

Step 3: Attributes

Step 4: Review

Description

Project Information

Selected Project Type: Commercial Development Project

* Display Name (back end use only): Annsett Stadium

* Description: Annsett Stadium Construction

☒ Display Project Folders

Thumbnail File (225 x 150)

Release / Security Information

* Status: Active ☐ Password Protect

Create Date: 1/1/2006 Release Date: 1/1/2007 Expire Date: 1/1/2008

Default Print Location

Cincinnati, OH - Adenium Digital Repro (DFS De...)

Previous Next Cancel

Enter the **Attribute** information. Click **Next**.

New Project

Create New Project

Step 1: Select Project Type

Step 2: Description

Step 3: **Attributes**

Step 4: Review

Attributes

ame	Value
Bid Due Date	2/1/2007
Project Architect	Mursch & Assoc.
Project General Contract	GC Inc.
Project Location	MainSt.
Project Name	Annsett Stadium
Project Number	123-0989
Project Owner	Columbus Unified Schools
Revision	
Version	

Previous Next Cancel

Review the project and click **Finish**.

Create New Project

Step 1: Select Project Type

Step 2: Description

Step 3: Attributes

Step 4: Review

Review

Description	
Display Name	Annssett Stadium
Description	Annssett Stadium Construction
Create Date	01/01/2006
Release Date	01/01/2007
Expire Date	01/01/2008
Display Project Folder	YES
Thumbnail File	C:\Documents and Settings\Doug\Local Settings\Apps\2...
Status	Active
Default Print Location	Cincinnati, OH - Adenium Digital Repro (DFS Demo System)

Attributes	
Bid Due Date	2/1/2007
Project Architect	Mursch & Assoc.
Project General Contractor	GC Inc.
Project Location	MainSt.
Project Name	Annssett Stadium
Project Number	123-0989
Project Owner	Columbus Unified Schools
Revision	
Version	

Previous Finish Cancel

The project is created and listed in the **Available** list. Select the project and click the right arrow to move it to the **Selected** list. Click **OK**.

My Projects

Available

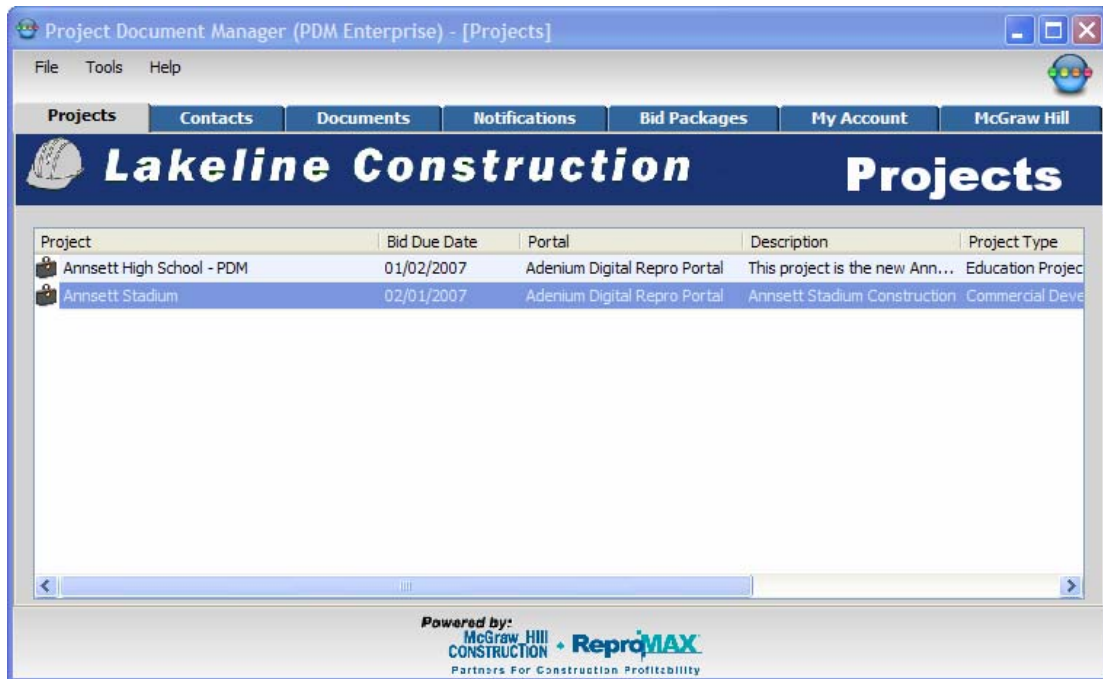
Portal / Project	Status
Adenium Digital Repro P...	
Annssett High School ...	Active
Annssett High School ...	Active
Annssett High School ...	Active
Annssett High School ...	Active
Annssett High School ...	Active
Annssett High School ...	Active
Annssett Stadium	Active
Carson Clothing Stor...	Active
Columbus Bobcats St...	Active
Eastlake Municipal Ai...	Active
Great Lakes South H...	Active
HAB Building Project	Active
I-90 Memorial Bridge...	Active
Liberty Public Pool R...	Active

Selected

Project	Portal
Annssett High School - ...	Adenium Digital Repro ...
Annssett Stadium	Adenium Digital Repro ...

Ok Cancel

The project is listed on the **Projects** tab.



CONTACT MANAGEMENT

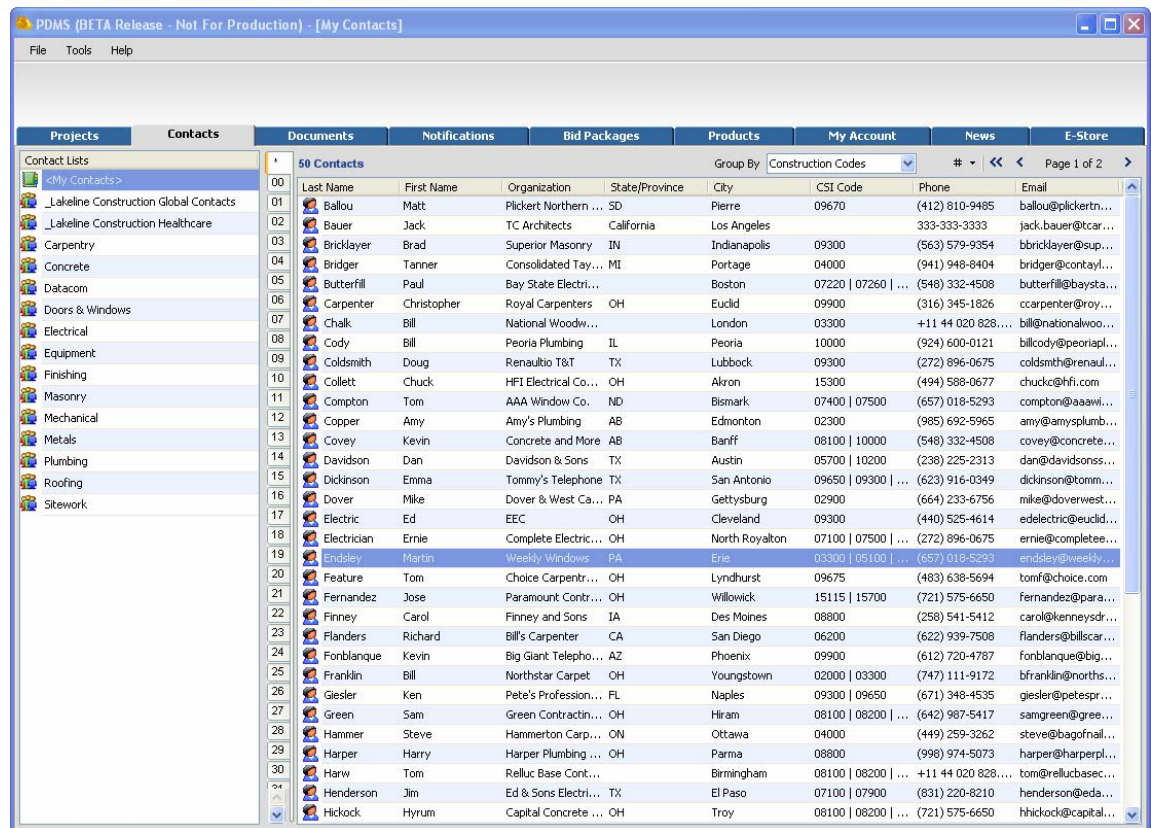
PDM contains a very robust contact management system that is easy to use. Contacts can easily be created, imported, organized, and searched for. Contacts can be managed at two levels, at the global level and the project level.

Organizing Contacts

There are many ways that you can organize and search for contacts in PDM. With large numbers of contacts, you can find them by browsing through contact lists, by sorting by fields, by sorting by groups, or by running a search based on criteria.

You can change the view of your contact list by organizing columns and sorting them. You can put the columns in the order you want to see them. To organize your columns, click on the column header that you want to move and drag it to where you want to display it. (Be sure to drag it only along the column headers.)

To sort a column, click on the column header. To make a secondary sort, click on the second column header. To remove a sort, click on the column header again.



You can also show your contacts in groups. To show a group, select it in the **Group By** list. For example, if you want to display contacts by last name, select **Last Name** from the list.

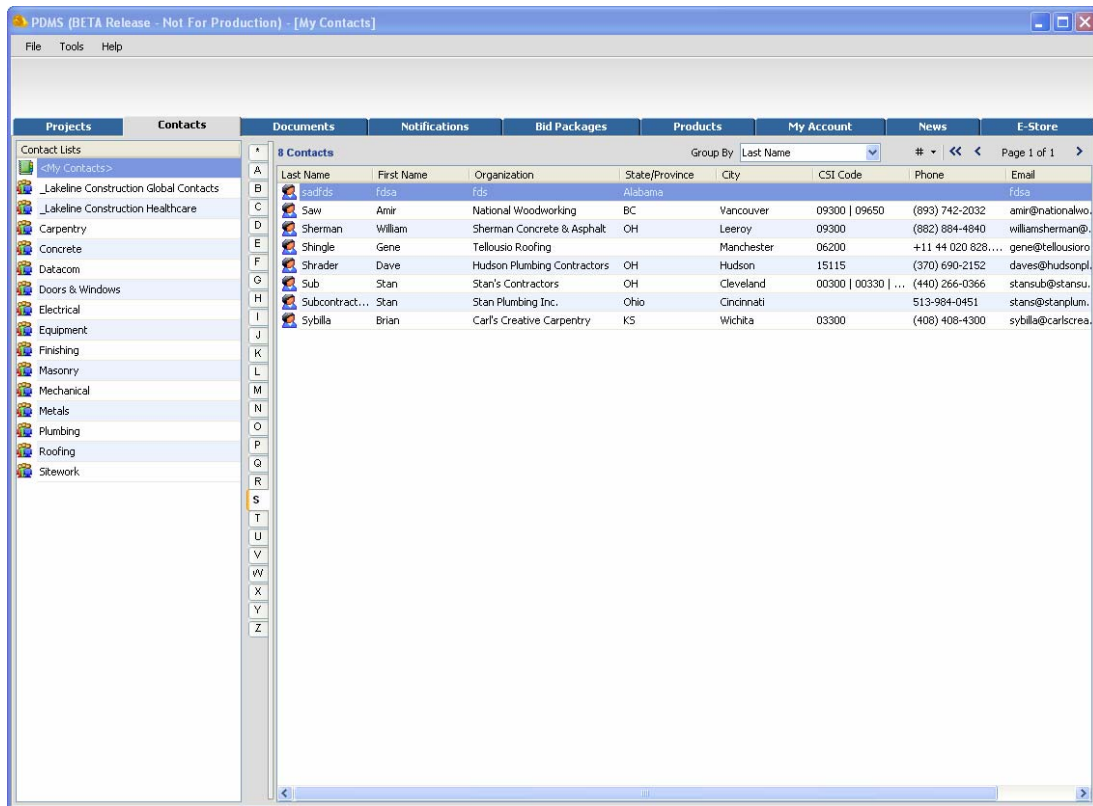
Group By Last Name

When you do this, the tabs down the side will allow you to easily see contacts that start with that letter or number. Click on the tab that contains the information you want to display.

For example, if you want to show all of the contacts with the last name that begins with “S”, click on the “S” tab.



The list will display all of the contacts with the last name beginning with “S”.



Click the star (*) to display all.

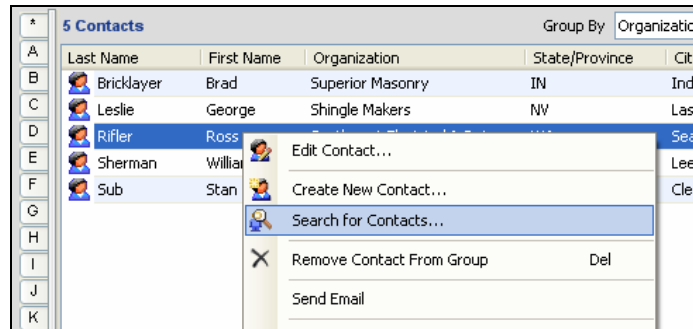
You can also group contacts by First Name, Organization, and Construction Codes.

Group By Organization

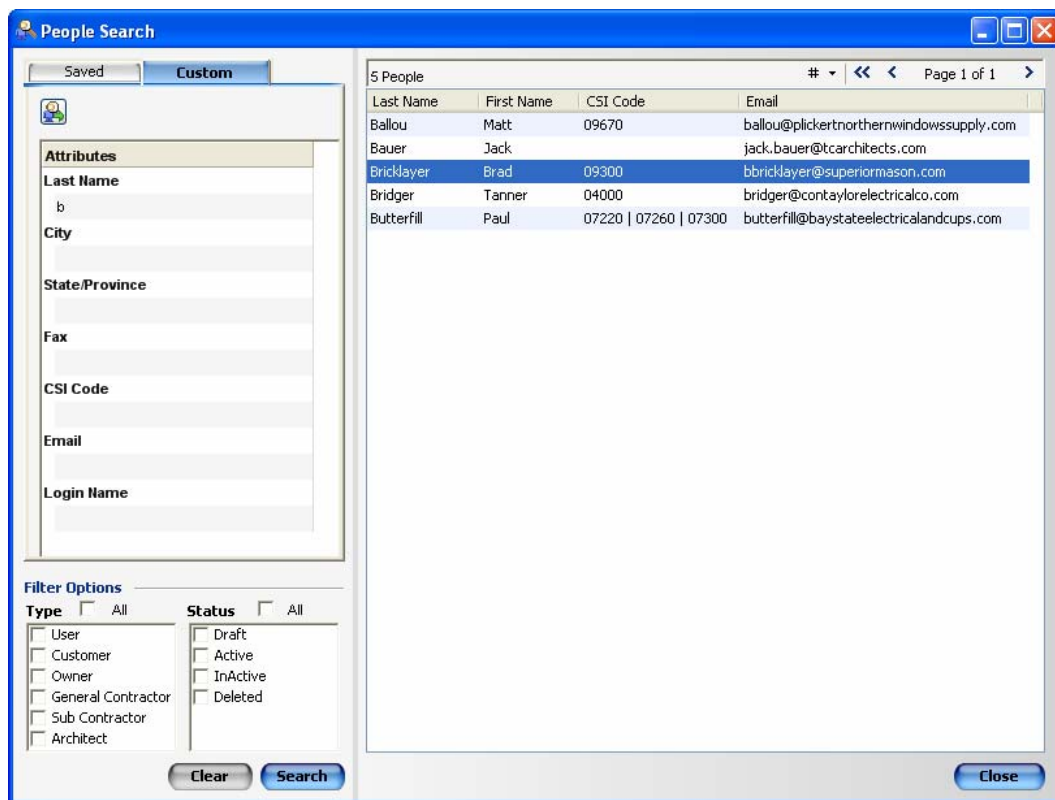
Searching for Contacts

When you have very large contact lists, or when you are having trouble locating a contact, you can search for contacts by any attribute.

To search for contacts, right click and select **Search for Contacts**.



Enter in the search criteria by which you want to search in the Attribute Field by which you want to search. Click **Search**. You can enter any combination of contact information to perform a search.



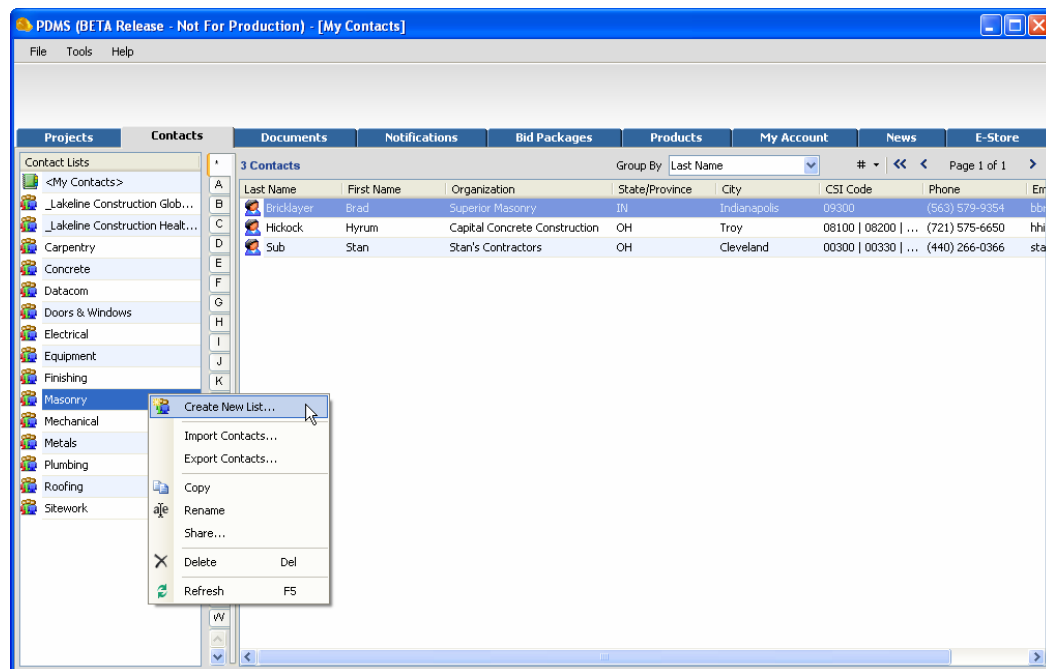
The results will be displayed. Once you have located the appropriate person, you can drag the person to any screen that lists contacts. For example, you could drag a searched contact to a contact list, to a bid package as an invitee, or to a notification.

Creating Contact Lists

You can organize your contacts in contact lists. Contact Lists can be used to organize groups of contacts by discipline, geography, bonding amount, or any other criteria. You can create as many contacts lists as they like and add small or large numbers of contacts to each list.

A contact can be in multiple lists, but there is only one contact record. When the contact information is updated in one list, it is updated in all lists.

To create a new list, right click on the **Contacts List** panel and select **Create New Contact List**.



Enter the name of your new contact list and click **OK**.

To add contacts to the list, search for the contacts you want to add using the Contact Search window.

Drag the contact to the main PDM Contact window and drop him on the newly created contact list.

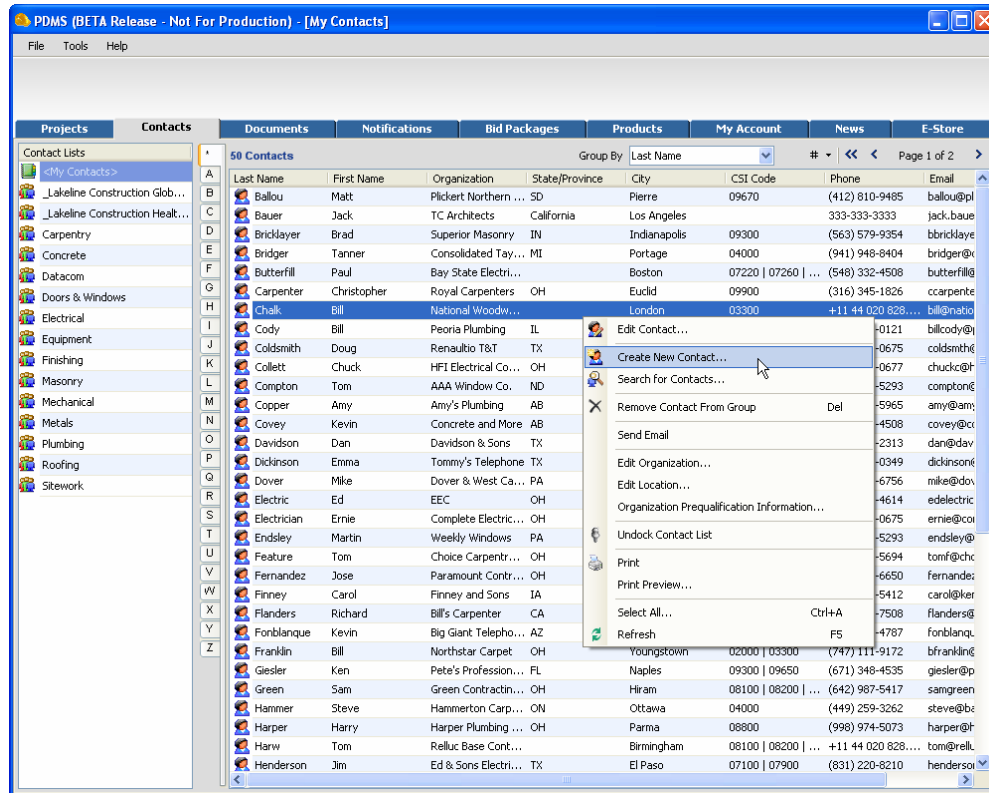


Click on the newly created contact list to show that the contact has been added to the contact list.

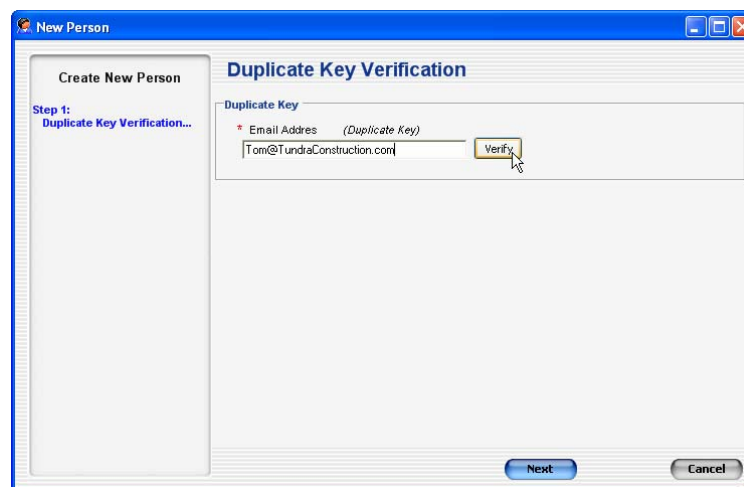
Creating New Contacts

You can create a new contacts. All contacts have a unique identifier (their email address) and belong to an organization and location.

To create a new contact, right click on the contact list, and select **Create New Contact**.



Enter an **Email Address** and click **Verify** to see if it is unique. PDM uses the email address as a unique duplicate key. This assures that duplicate contacts aren't entered into PDM. Click **Next**.



Contacts are organized based on the organization and location where they are based. This makes it easy to locate information on multiple people within the same company.

To create a new organization, click **New** to the right of the **Organization** text box.

The screenshot shows the 'New Person' dialog box with a sidebar on the left titled 'Create New Person' containing five steps: Step 1: Duplicate Key Verification..., Step 2: Organization Location (highlighted), Step 3: Contact Information, Step 4: Contact List, and Step 5: Attributes. The main area is titled 'Organization And Location' and contains two sections. The 'Organization' section has a 'Name' text box, a 'Search' button, an 'Edit' button, and a 'New' button. A mouse cursor is clicking the 'New' button, and a tooltip 'New Organization' is visible. The 'Location' section has a 'Name' dropdown menu, an 'Edit' button, and a 'New' button. At the bottom are 'Previous', 'Next', and 'Cancel' buttons.

Enter the organization information. You can enter standard organization information, as well as basic prequalification information.

The screenshot shows the 'New Organization' dialog box with several sections. The 'General Information' section includes 'Display Name' (Tundra Construction), 'Type' (General Contractor), 'Web Address' (www.Tundra.com), and 'Domain Name' (tundra.com). The 'Work Information' section includes 'Bond Limit' (\$1,000,000.00), 'Max Job Size' (\$20,000.00), and 'Union Shop' (No). The 'Business Classifications' section includes 'MBE' (Yes), 'WBE' (Yes), and 'DBE' (No). The 'Locations' section is a table with columns: Default, Can Edit, Display Name, Address, Phone, and Email. It contains one row with the 'Default' checkbox selected. To the right of the table are buttons for 'Add', 'Edit', 'Delete', and 'Default'. At the bottom are 'Prequalification', 'Ok', and 'Cancel' buttons.



Frequently users who are searching for subcontractors to be used on a project will need to assure that they have a certain percentage of subcontractors who are “Disadvantaged” bidding on the project. The basic system allows the user to search for subcontractors by the three most common disadvantage types: Minority Business Enterprise (MBE), Woman owned Business Enterprise (WBE), and Disadvantaged Business Enterprise (DBE).

Each organization may have one or more locations where they conduct business. PDM allows each of these locations to be separately identified. This allows a user to locate the appropriate location for performing work on a remote project. To create a new location, click **Add**.

Fill out the appropriate information for the location of the new contact, and then click the **Contact** Tab.

New Location

General | Contact | Members

General Information

* Display Name: Tundra West Location

Trade: Plumbing

Web Address: www.tundra.com

☒ Default Location For Organization

Construction Codes

00100
00200
00210

Set

Service Areas

Set

Ok Cancel

Enter the address and telephone information for the new location.

Click **OK** to save the information.

The new organization and the new location will be displayed in the summary screen.

Click **OK**.

New Person

Create New Person

Step 1: Duplicate Key Verification...

Step 2: **Organization Location**

Step 3: Contact Information

Step 4: Contact List

Step 5: Attributes

Organization And Location

Organization

Name: Tundra Construction [Search] [Edit] [New]

Location

Name: Tundra West Location (123 Main Tundra Cincinnati, Ohio (OH)) [Edit] [New]

[Previous] [Next] [Cancel]

Click **Next**

New Person

Create New Person

Step 1: Duplicate Key Verification...

Step 2: Organization Location

Step 3: **Contact Information**

Step 4: Contact List

Step 5: Attributes

Contact Information

General Information

Prefix: Mr. First Name: Tommy Middle: Last Name: Tundra Suffix:

* Display Name: Tundra, Tommy Title: President Occupation: Estimator

Contact Information

Country: UNITED STATES (US) Type: Firm [Apply Location Information]

Address: 123 South Main Tundra ☐ Default Contact For Location

City: Cincinnati State: Ohio (OH) Zip: 45236

County: Hamilton County Code: Carrier Route:

[Previous] [Next] [Cancel]

Enter the appropriate contact information and click **Next**.

New Person

Create New Person

Step 1: Duplicate Key Verification...

Step 2: Organization Location

Step 3: Contact Information

Step 4: Contact List

Step 5: Attributes

Contact List

Construction Codes

00300
00310

Set

Service Areas

Set

Contact Type

☐ User
☐ Customer
☐ Owner
☐ General Contractor
☒ Sub Contractor
☐ Architect

Previous Next Cancel

You can enter the construction codes for which this contact provide services. You can also enter a service area which identifies what geographic locations this contact should be used to service.

Select the **Construction Codes** and then click **Next**.



The Service Areas allows a user to search and locate contacts based on geographies services instead of office addresses. For example, a subcontractor may provide services in Dayton, Ohio even though their office is located 50 miles away in Cincinnati, Ohio. The user would specify two Service Areas: Greater Dayton Ohio, and Greater Cincinnati Ohio. Users searching either city would find this contact.

New Person

Create New Person

Step 1:
Duplicate Key Verification...

Step 2:
Organization Location

Step 3:
Contact Information

Step 4:
Contact List

Step 5:
Attributes

Name	Value
Entity Type	
Extended Profile	
My Territories	
* CSI Code	
Prequalified	
Union	
Minority	

Previous Finish Cancel

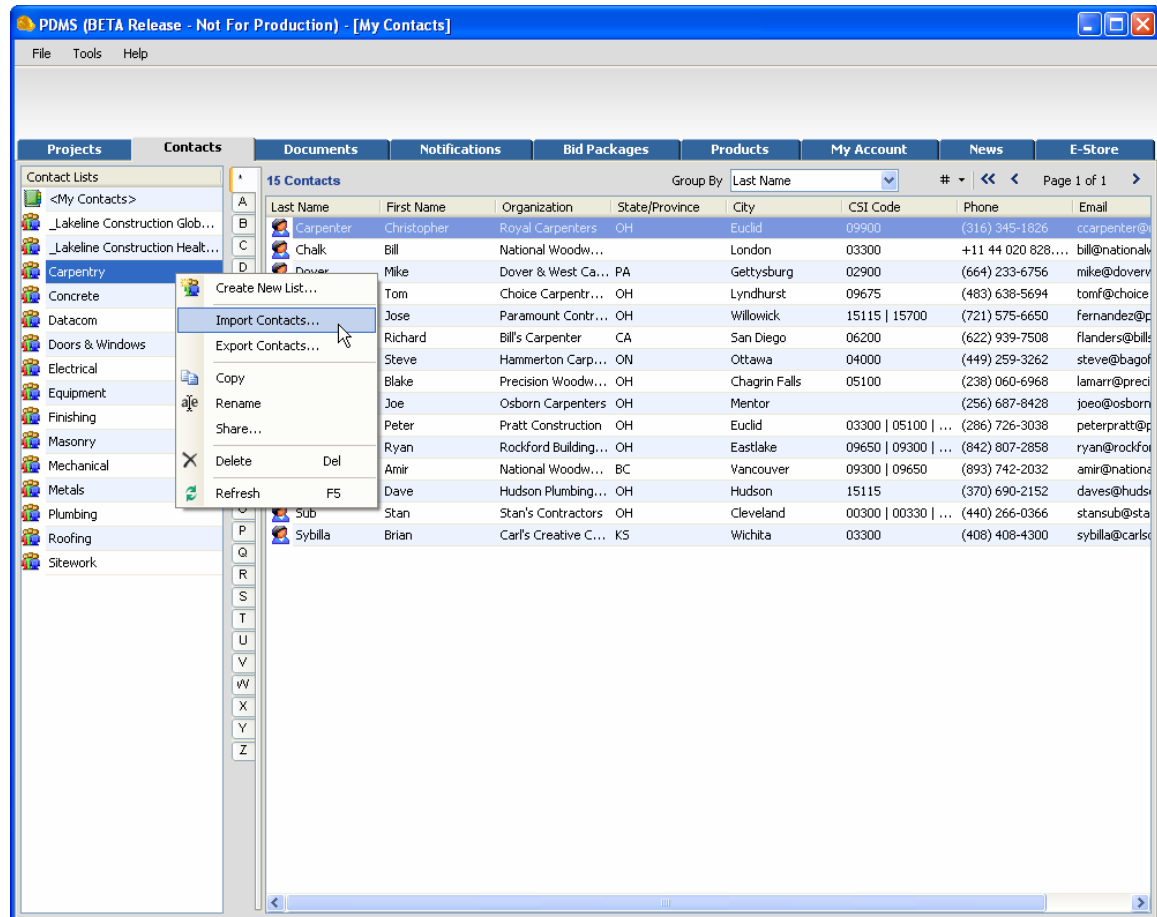
Enter any custom attributes for the contact.

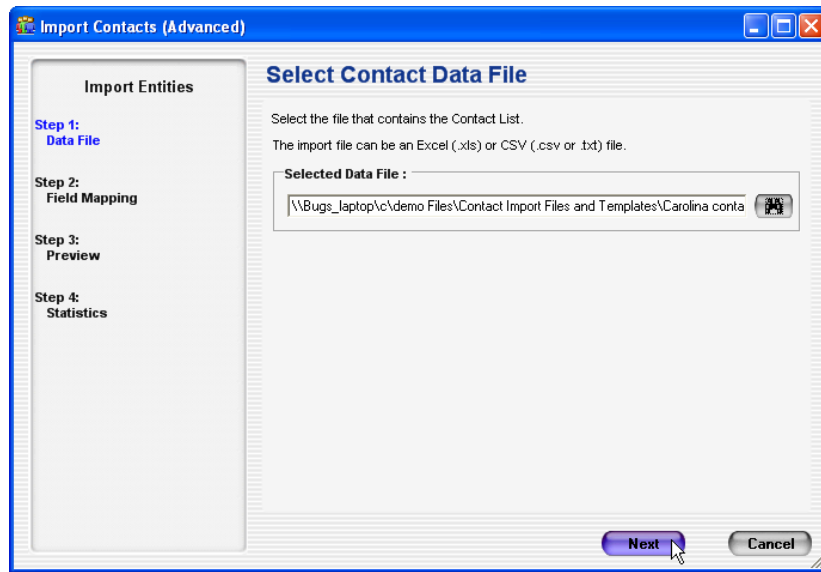
Click **Finish**.

Importing Contacting Lists

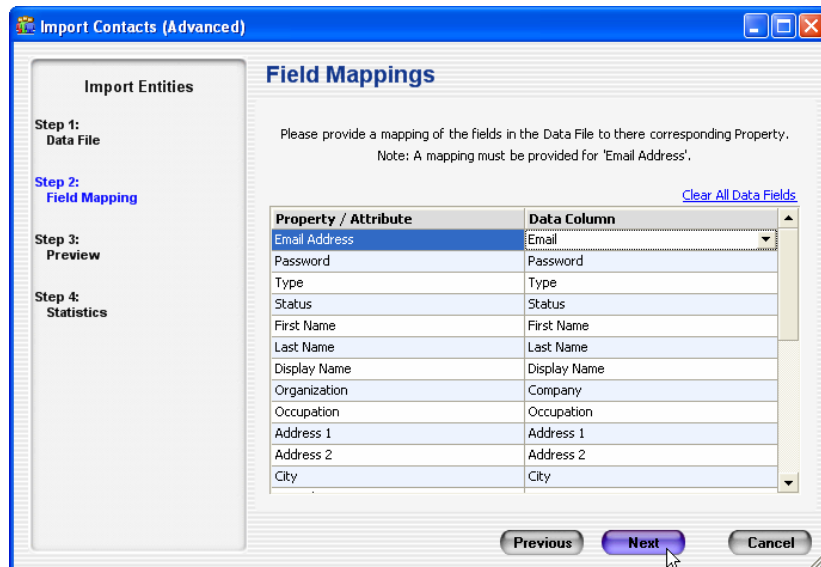
You can import a list of contacts from an external file. Contacts from other programs can be quickly imported into PDM.

Select a **Contact List** and then right click and select **Import Contacts**.

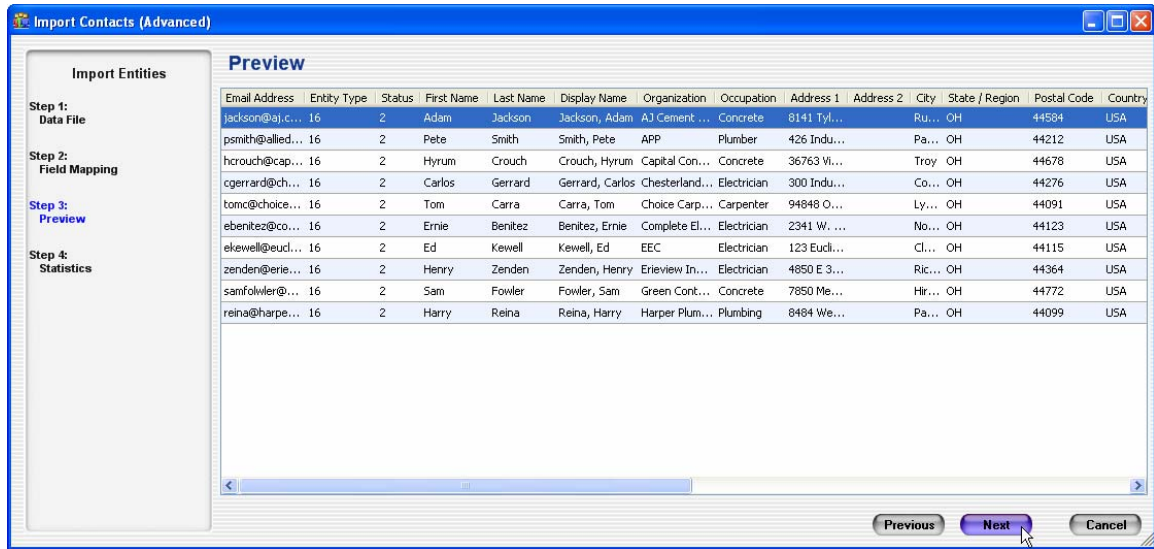




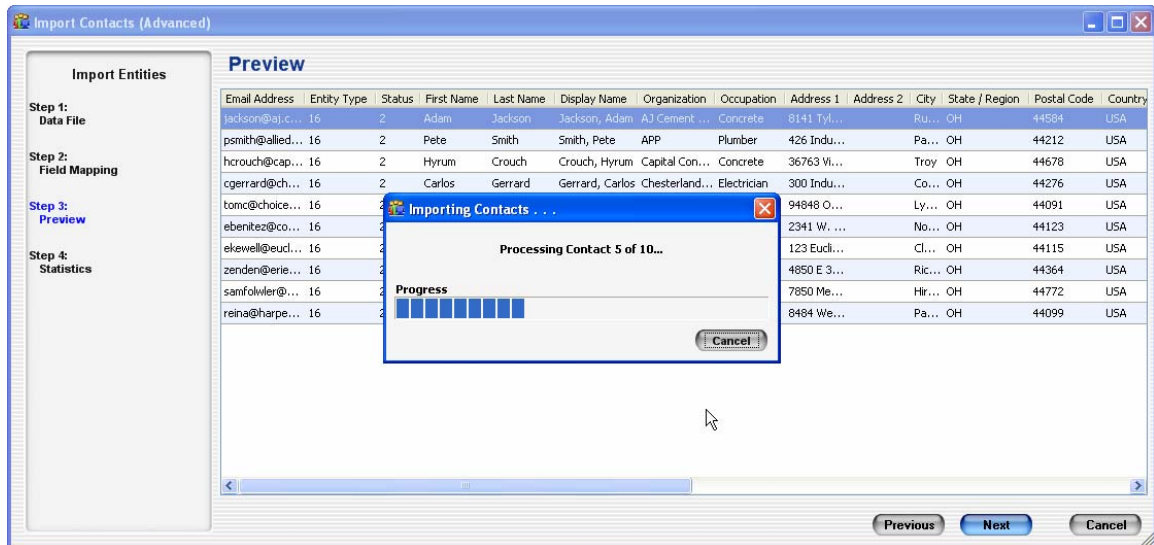
Click **Browse** and browse to the .xls or .csv file that contains the contacts you want to import and click **Next**.



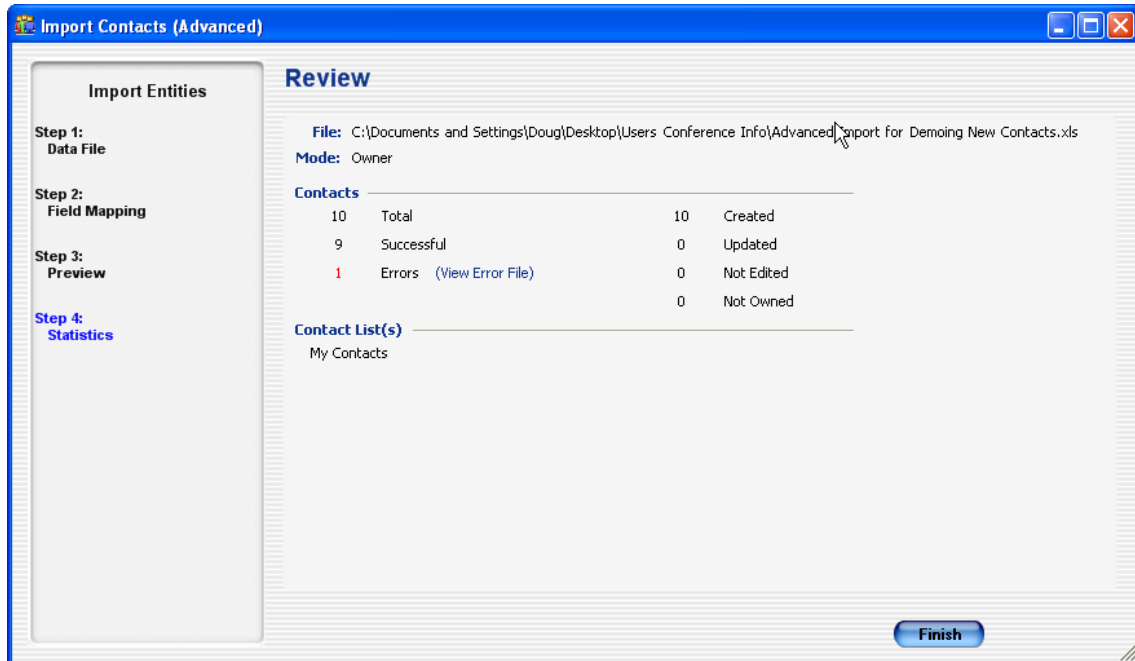
Verify that the fields contained in the contact import file match the properties of the PDM contact record then click **Next**.



PDM will display a list of all of the contacts to be imported. Verify that the information is correct. Click **Next**.



The new contacts will be processed and entered into the system.

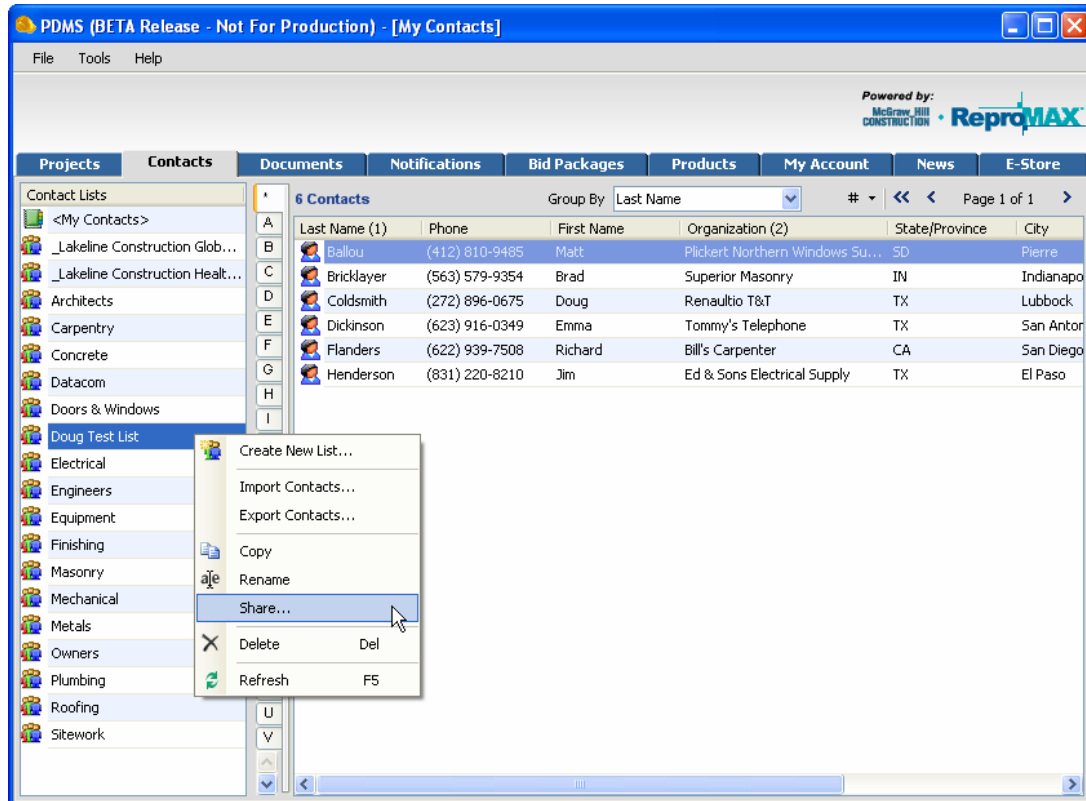


When PDM is finished importing, a summary of the records imported will be displayed. If any errors occur, it will allow you to view the information about each contact that caused an error so you can correct it and re-import it.

Click **Finish**.

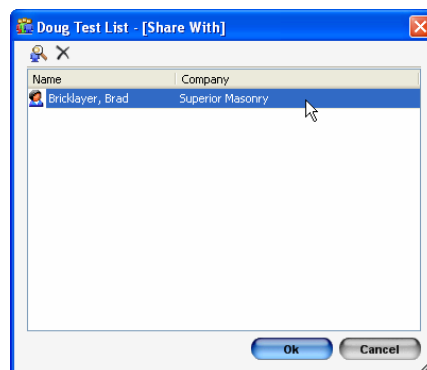
Sharing Contacts

PDM allows users to share their personal contact lists with others. This allows one group of project team members to share a custom list of contacts with others.



Right click on the contact list that you want to share and select **Share**.

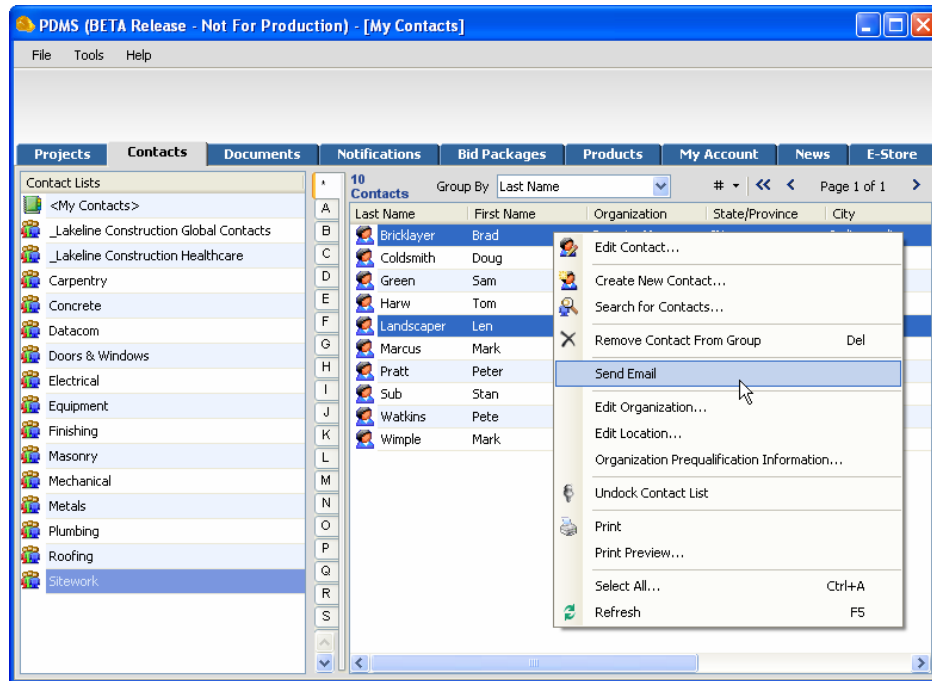
Drag the contacts with whom you want to share the contact list with into the **Share With** window. Click **OK**.



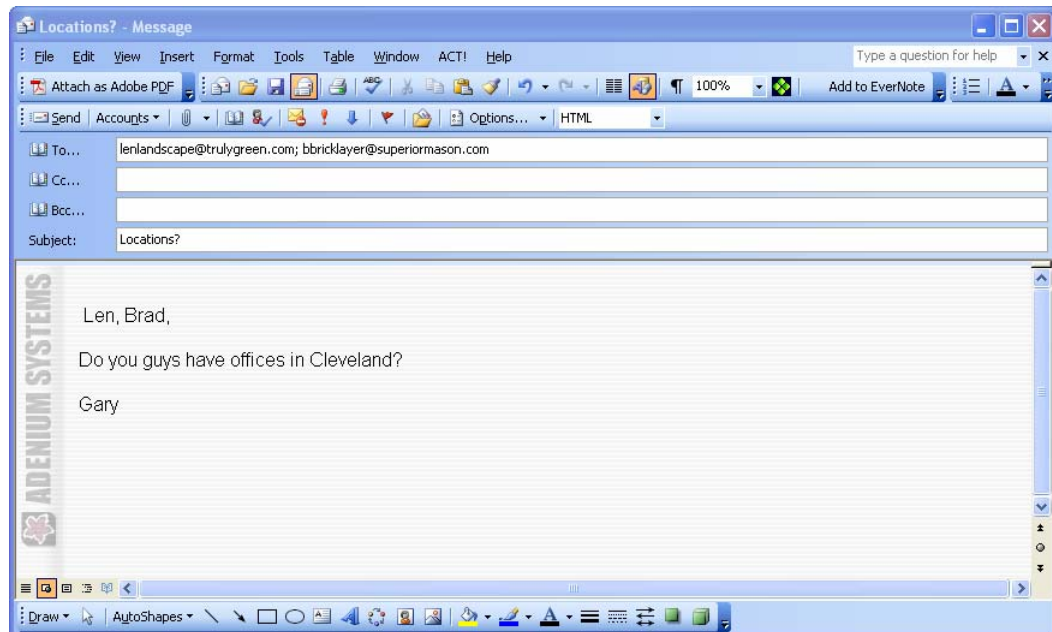
Emailing Contacts

You can send an email to any contact or contacts directly from PDM. This saves you the time to create a new email and type in the email addresses.

To send emails, select one or more contacts, right click, and select **Send Email**.



A new message will open with the **To** field already populated with their email addresses.



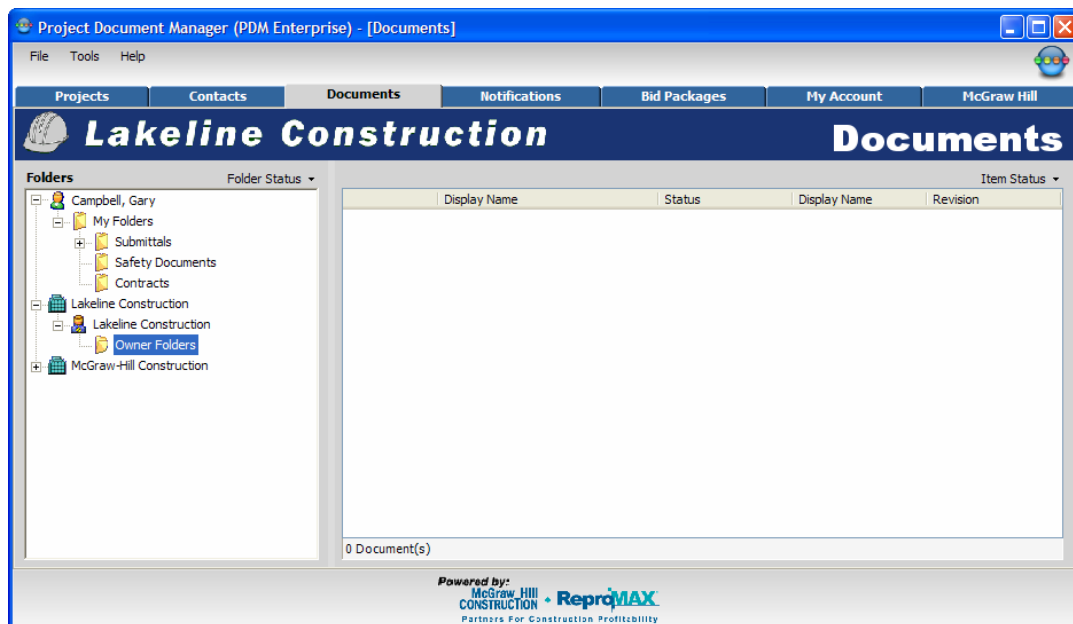
Type your message and click **Send**.

Note: Emails sent this way are NOT tracked in PDM.

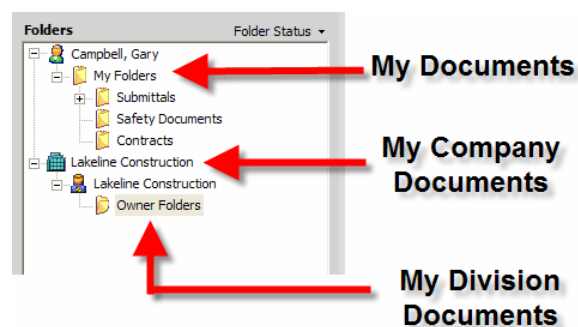
DOCUMENT MANAGEMENT

Documents Tab Operations

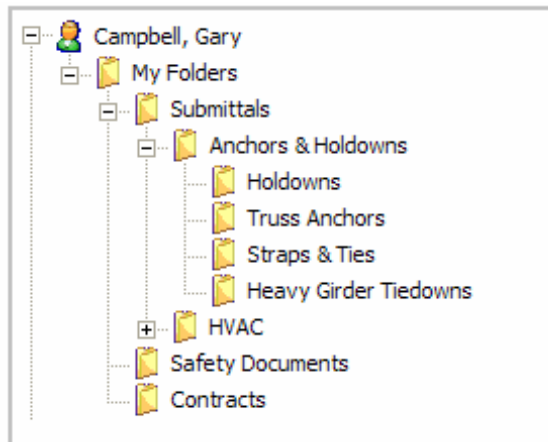
PDM provides two types of document storage and organization. Non-Project Documents and Project Documents. The Non-Project documents are documents organized in the base PDM application in three distinct groups: Personal Documents called “My Documents”, Company Documents called “My Company’s Documents” and Divisional documents called “My Division” Documents.



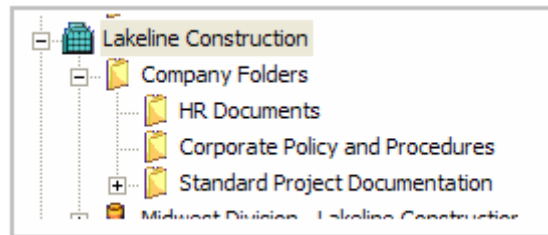
On the Documents tab, you can modify your “My Documents” folder structure and access the Company and Division documents in the tree structure if they have been given permission to access those folders.



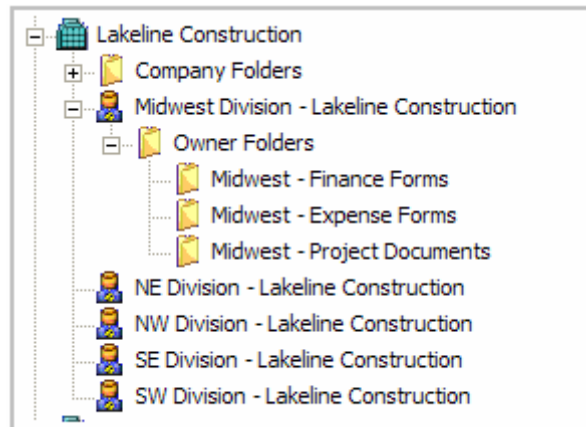
Personal documents:



Company documents:



Division documents:



Document Manager Operations

There are many advantages of working with PDM Document Manager. PDM Enterprise tracks all document activity. With PDM's version control system, every document that comes into PDM is versioned. If a duplicate document is added to DFS, it gets a new revision number and becomes the current version and previous versions are marked with a red dot to indicate that it is an older version. No documents are deleted or over-written.

There are three ways to access a document that is already in PDM. You can open, edit, or view the document.

Opening a Document: When you open a document, you are opening the native "Design" format of the document in Read-Only mode.

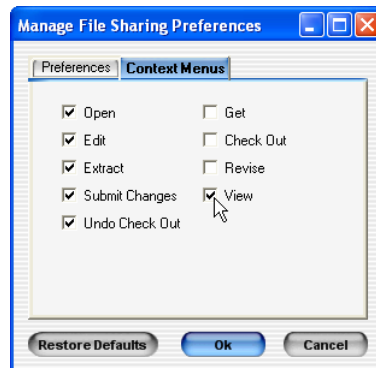
When you edit a document, you are checking out the "Design" format of the document. The document is marked as "Under Change" and no one else can make changes. You can then make changes and then check the document back in as a new version.

Viewing a document: When you view a document, you are opening the "Viewable" format of the document. This might be the same as the design format or it might be in a different format. For example, if you view project plans, the original may be a TIF file but the viewable format could be a low-resolution PDF file.

You can always access documents from the Manage Documents window. Every time you view, open, or edit a document, it is downloaded to your local machine. PDM Enterprise will select the download location. As a consequence, you do not need select, remember, or search for a document download location. All you have to do is access it right out of the Manage Documents window. If you already have the current version downloaded to your local machine, PDM will access the local copy. If it is not the current version, PDM Enterprise will download the current version for you. PDM Enterprise manages all of your downloads for you.

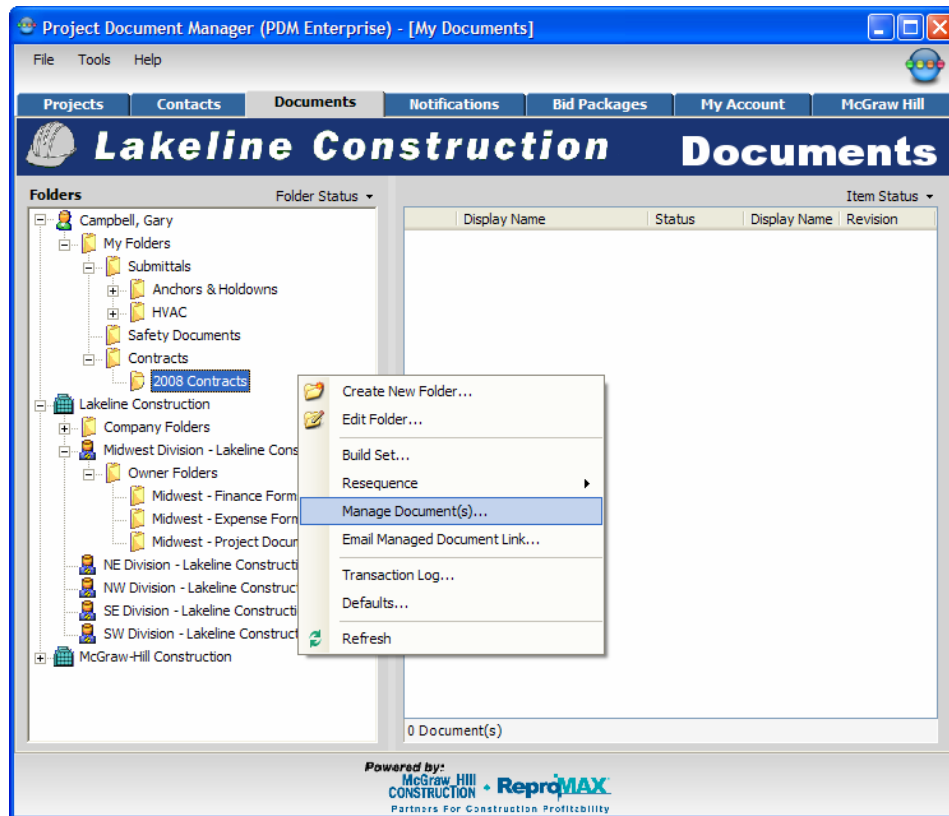
Note: If **Open**, **Edit**, or **View** do not appear in the right click menu, you need to turn them on by going to the **Manage** menu and selecting **Options**.

Select, **Open**, **Edit**, and **View** on the **Context Menus** tab and click **OK**.



Adding Files to a Documents Folder

PDM provides a sophisticated Document Capture application. Right click on the Documents Window and select “Manage Documents”

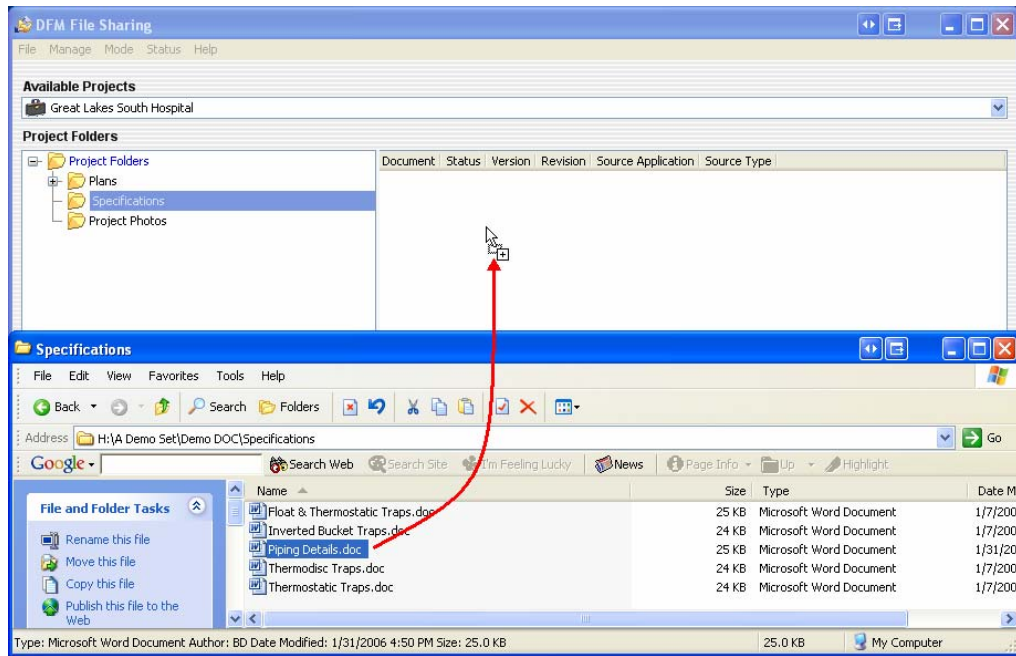


The manage documents window will be displayed.

Windows files can be added to any folder by dragging them into the Manage Documents window.

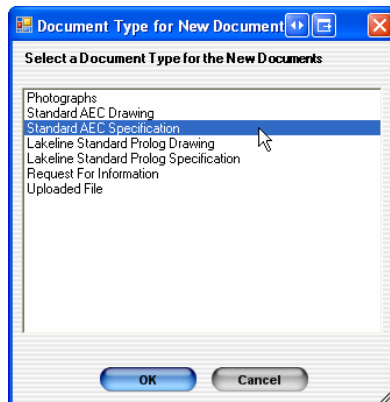
To add files to a folder, select the project under Available Projects. All the projects that you have access to are listed there. Under Project Folders, select the folder in which you want to add the files.

Then, on your local drive, select the files that you want to add to the folder and drag them into the open folder in the Manage Documents window.



When you drop the files, the files may be uploaded immediately or you may be prompted to enter some further information. Some folders will require you to enter information about the documents that you are adding before they are uploaded. If prompted, do the following (you may not be prompted for all of the following steps):

Select the type of document it is and click OK.



Select Active or Draft to set the status of the documents. Active documents are immediately available for viewing and ordering if this project is on a DFS web portal. Draft documents must go through an approval process before they are available on the DFS web portal.



Enter the attributes for the documents and click OK. A red star next to a field indicates that the attribute is required.

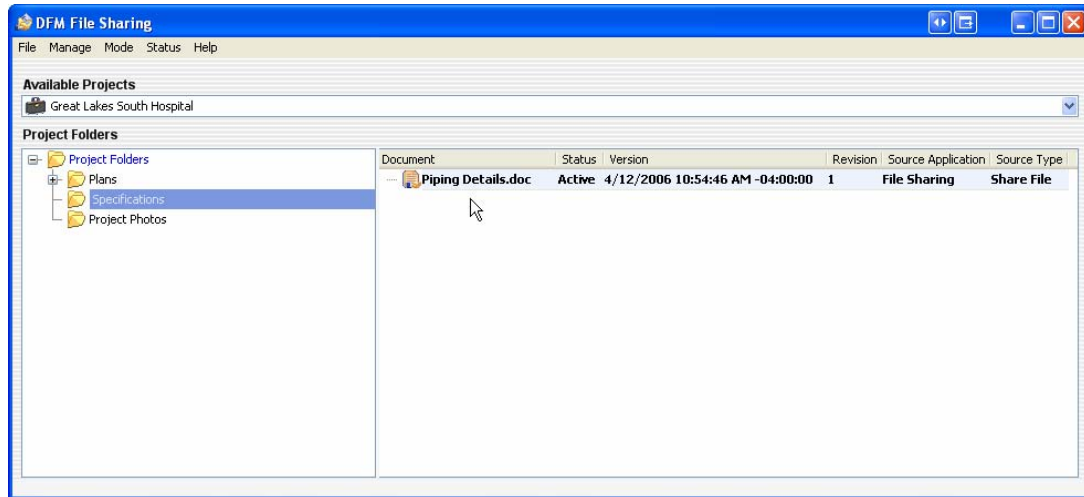
A screenshot of a Windows-style dialog box titled "Attributes for Piping Details.doc". It has a blue title bar with standard window controls. The dialog contains several text input fields, each with a label and a "(Text)" suffix: "Name" (containing "Piping Details.doc"), "Item Number" (containing "Piping Details.doc"), "Version" (containing "4/12/2006 10:54:46 AM -04:00:00"), "Revision" (containing "1"), "Project Name" (containing "Great Lakes South Hospital"), and "Division" (containing "HVAC"). At the bottom are "OK" and "Cancel" buttons. A mouse cursor is pointing at the "OK" button.

The document will be uploaded into PDM and will appear in the folder.

If you added a file into a folder that already contains a file with the exact same name, then a new version of the existing document will be created. If the file name is unique, then the document will go in as the first revision.

After taking the time to enter 3 or 4 documents, let the customer know ReproMAX members can provide you with production importing and indexing services drastically reducing the time it takes to import documents into the customers archive.

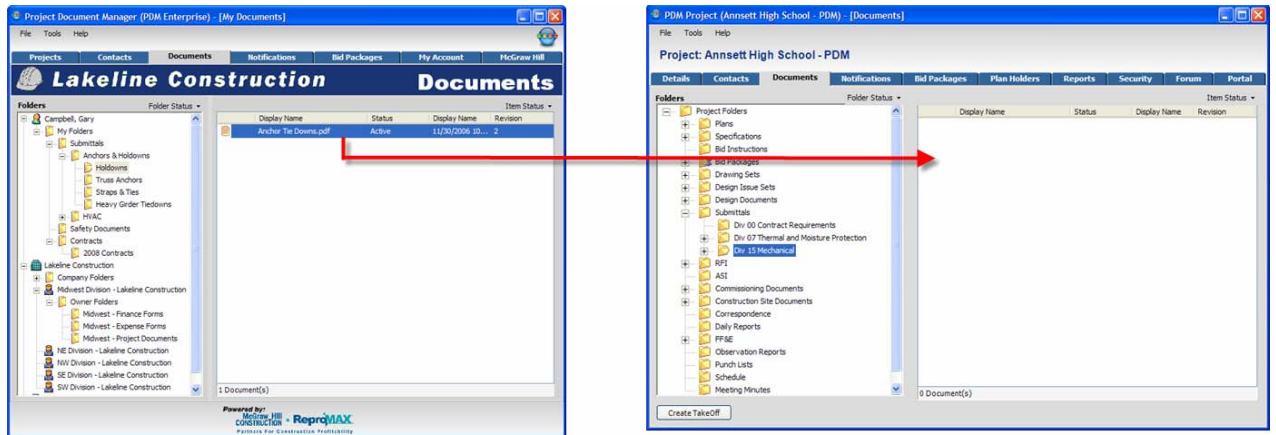
Don't forget, before the documents can be fully processed you must start your Gateway Processor.



Copying Documents Between Folders

PDM allows documents to be dragged between any two folders. PDM will add the document to the second folder.

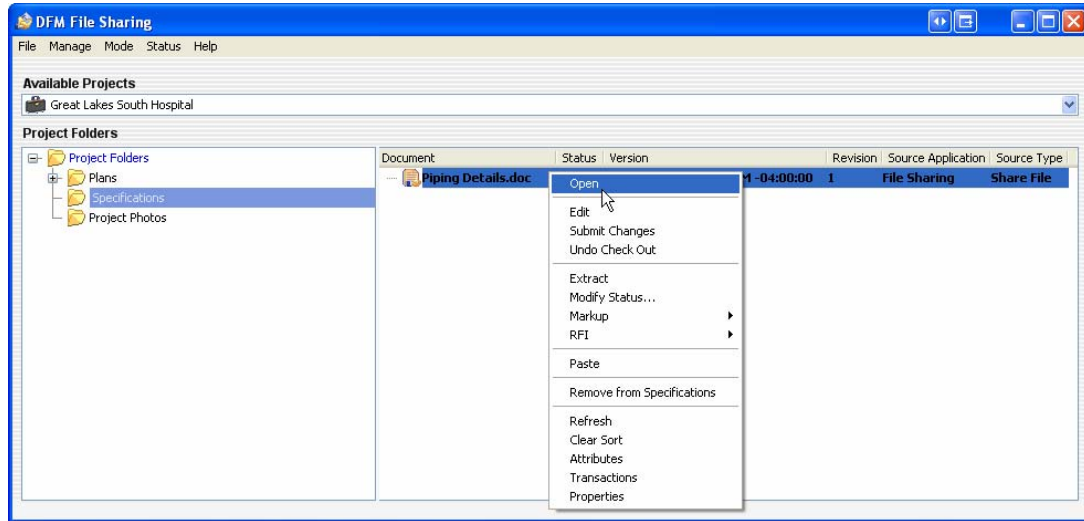
If you wanted to drag a document from your “My Document” folder to a project, you could simply open both windows and drag the appropriate files between the two windows.



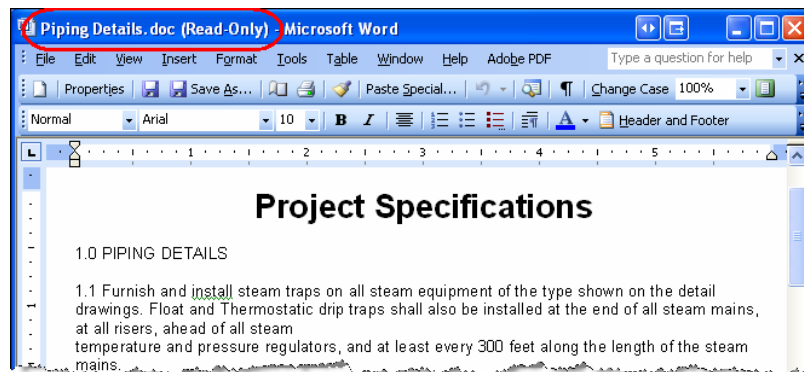
Opening a Document

Opening a document will open the native design format in Read-Only mode.

To open a document, right click on the document and select Open.



The document is downloaded to your machine and is opened in Read-Only mode.

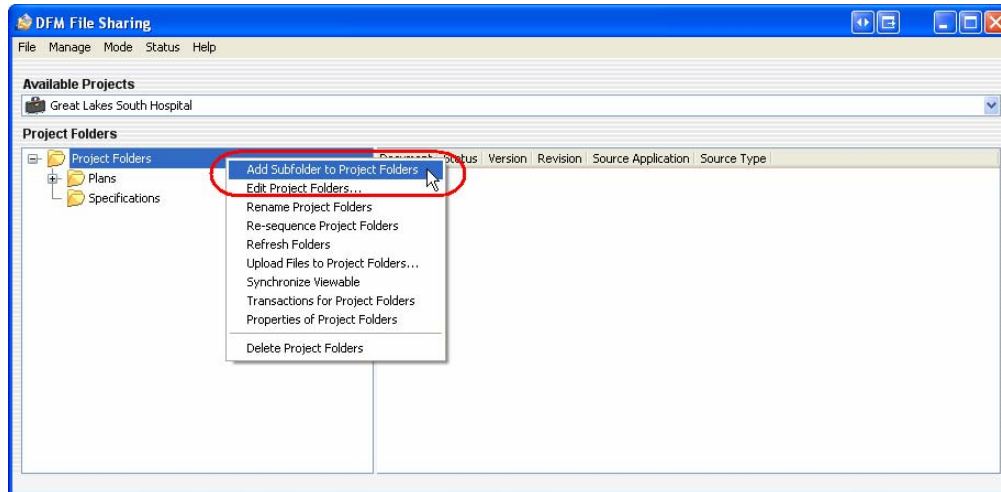


Close the document when you are finished. If you need to re-open it, repeat the steps to open the file in Manage Documents. PDM Enterprise will not need to download the document again unless it has been updated. In which case, it will download and open the current version.

Creating a Subfolder

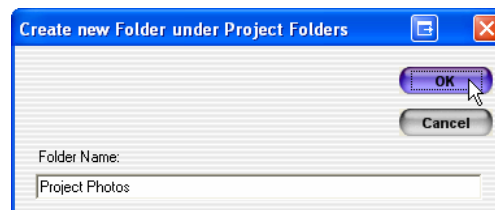
You can add subfolders to any folder in the folder tree.

To add a subfolder, right click on the folder in which you want to add the new folder and click **Add Subfolder To <Folder Name>**.

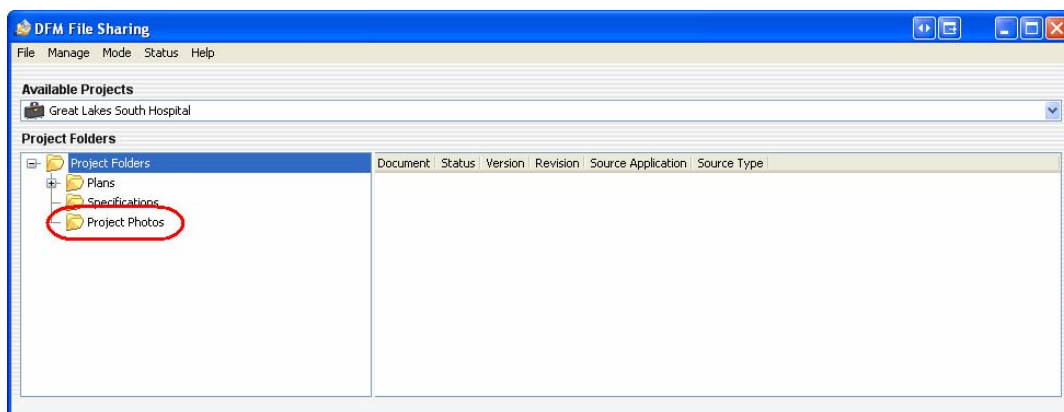


Enter the name of the folder in the **Folder Name** field and click **OK**.

Note: You cannot have multiple folders with the same name. This includes inactive and deleted folders that may not be displayed.



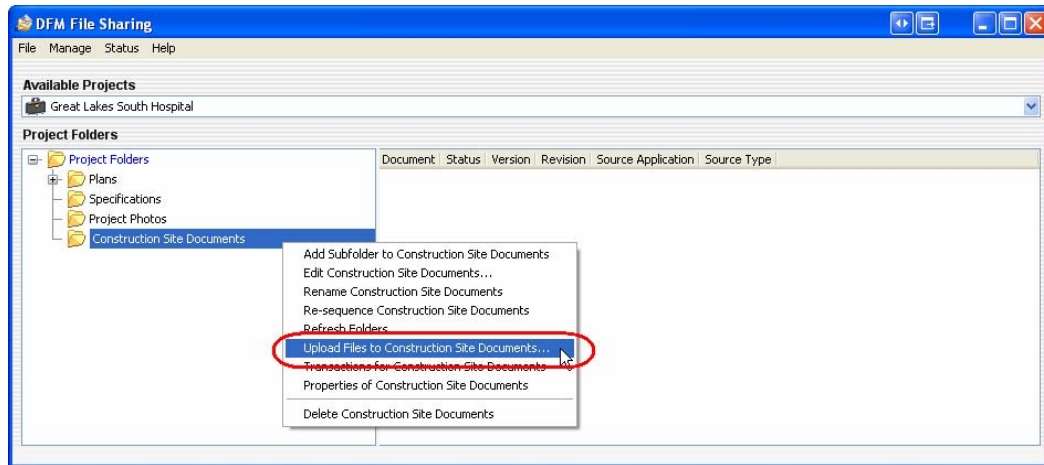
The folder is added.



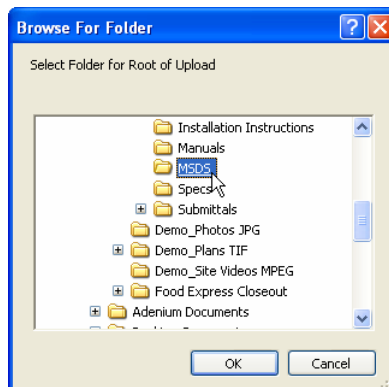
Adding Documents to Folders by Browsing

You can upload a batch of documents into Manage Documents. There are two ways to do so, you can use the Upload Files menu option or drag a folder or documents into the Manage Documents window. If you drag a folder or documents, you get the additional option of compressing the files into one ZIP file.

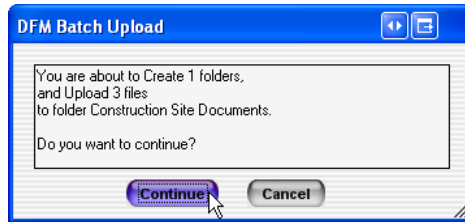
To upload a folder and all of its documents and subfolders, right click in Manage Documents on the folder to which you want to upload the files and select Upload Files To.



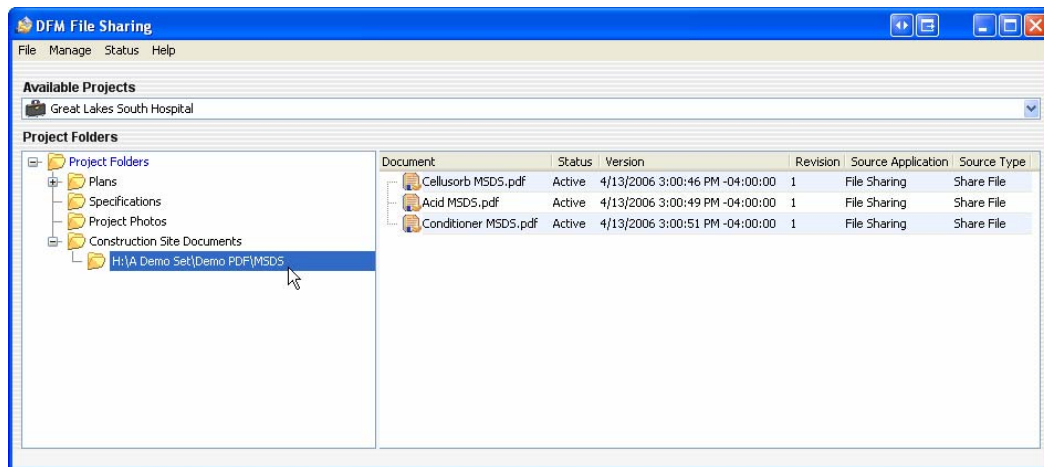
Select the folder that you want to upload and click OK.



A message displays to verify what you are about to upload. Click Continue.



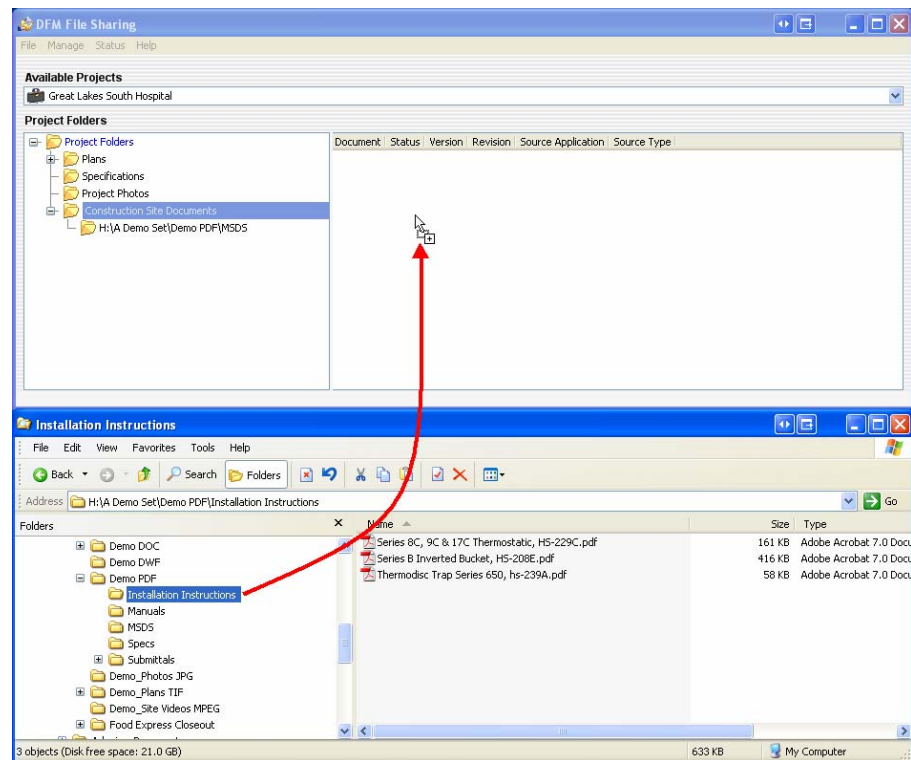
The folder is uploaded with all of its documents and subfolders. The Manage Documents folder name is the original path of the folder. You can rename the folder if needed.



Adding Documents to Folders by Drag and Drop

You can drag and drop a folder or a group of documents into a Manage Documents folder. When you drag a folder into Manage Documents, you can upload it as a single ZIP file or as individual files and folders.

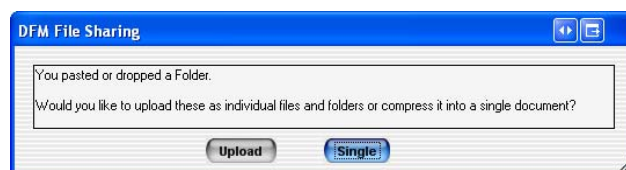
To upload folders or documents, select the folder in Manage Documents in which you want to upload the files. Drag the folder or group of documents into the Manage Documents window.



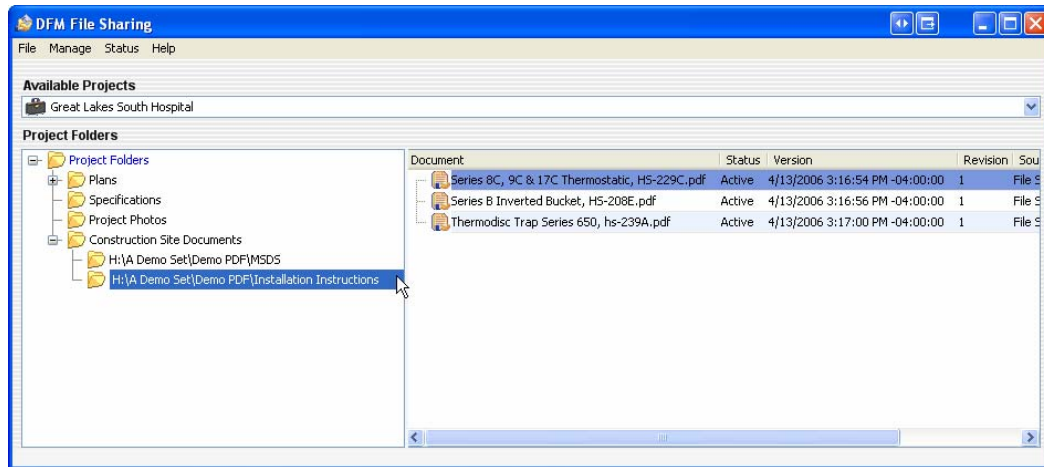
If you are uploading a folder, you are asked if you want to upload it as individual files and folders or if you want to compress them into a single ZIP file.

Do one of the following:

- Click Upload to upload the folder and all subfolders and documents as individual files.
- Click Single to compress all of the files into a single ZIP file.



If you selected Upload, the folder is uploaded with all of its documents and subfolders. The Manage Documents folder name is the original path of the folder. You can rename the folder if needed.

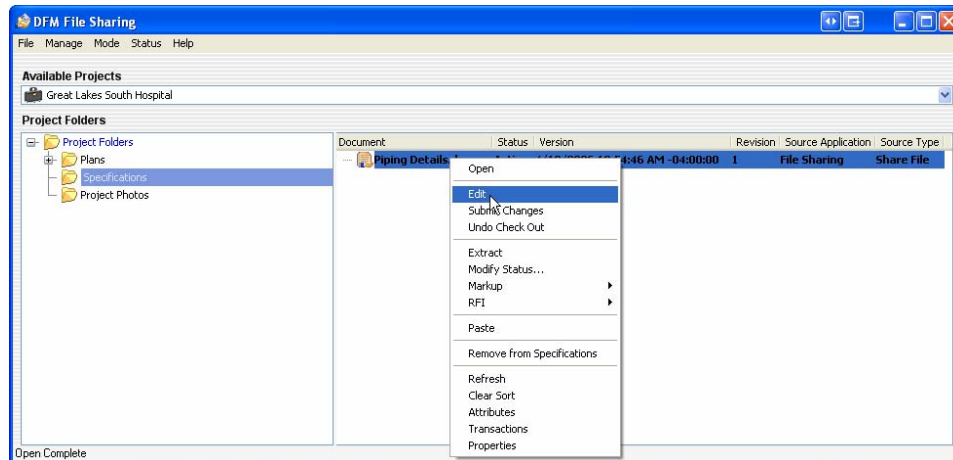


If you selected Single, a single ZIP file is uploaded into the folder you selected.

Editing a Document

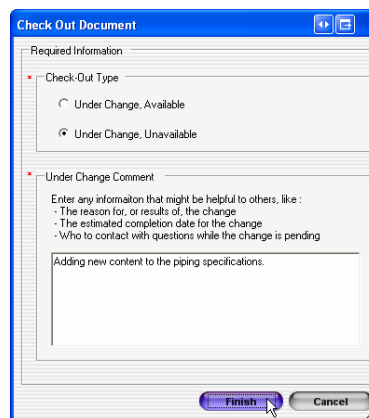
When you edit a document, you are checking out the “Design” format of the document. The document is marked as “Under Change” and no one else can make changes. You can then make changes and then check the document back in as a new version.

To edit a document, right click on the document and select Edit.

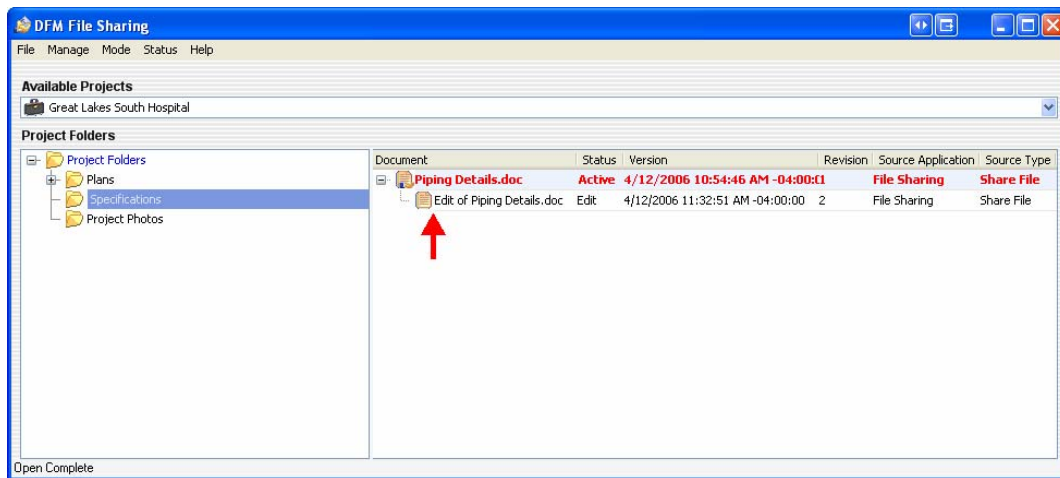


Do one of the following:

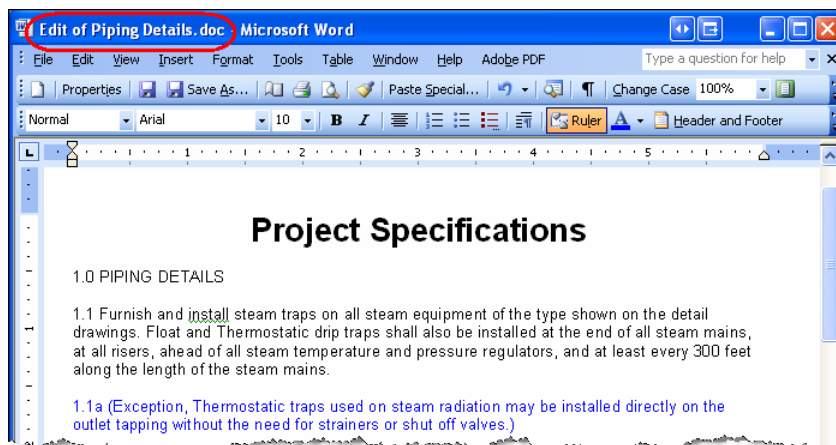
- Select Under Change, Available. This will mark the document as “Under Change” and keep it available for other users to view the document while it is checked out.
- Select Under Change, Unavailable. This will mark the document as “Under Change” and restrict the document from being accessed by others while it is checked out.
- Enter a description of why you are editing the document for the Under Change Comment. Click Finish. This information will be displayed to others people who are using PDM.



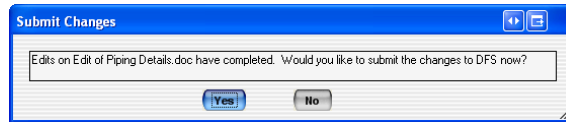
The document will be downloaded to your machine. In Manage Documents, the document will be displayed in red, indicating that it is under change. It also displays the edited version of the document under the original.



The document is open and available for editing. The title of the document begins with "Edit of..." indicating that this document is under change and editable. Make the necessary edits.

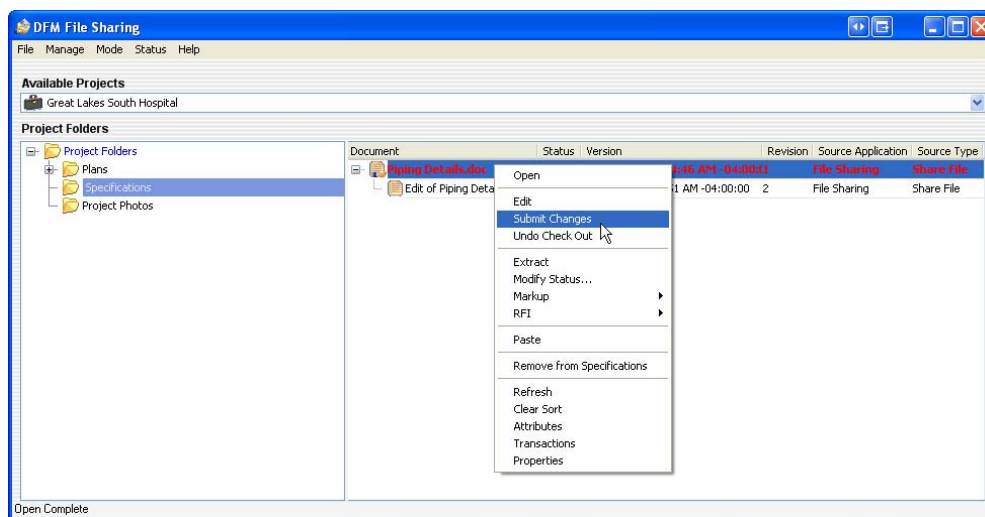


When complete, you can close the document and application. When you close the application used to edit the document, PDM Enterprise will prompt you if you want to submit the changes now. Click Yes or No. If you click Yes, the document will be uploaded as a new version. If you click No, the document will remain checked out. (In order for this message to display, the application must have been opened by PDM Enterprise and then completely closed. If the application was previously open or if you close the document only and leave the application open, this message will not display.)

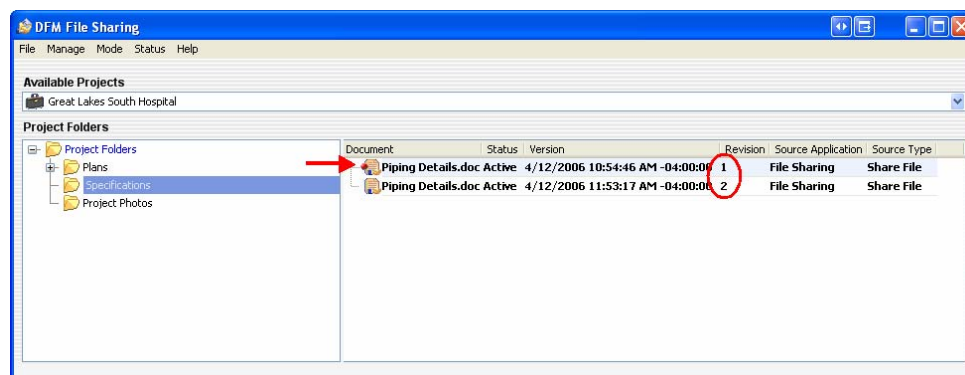


If you do not submit the changes now, you can reopen the "Edit of" document from Manage Documents to make further edits. PDM Enterprise will automatically access the checked out document that you have on your machine.

You can submit the changes at any time. To submit the changes and check the document back in as a new version, right click on the document in Manage Documents and select Submit Changes.



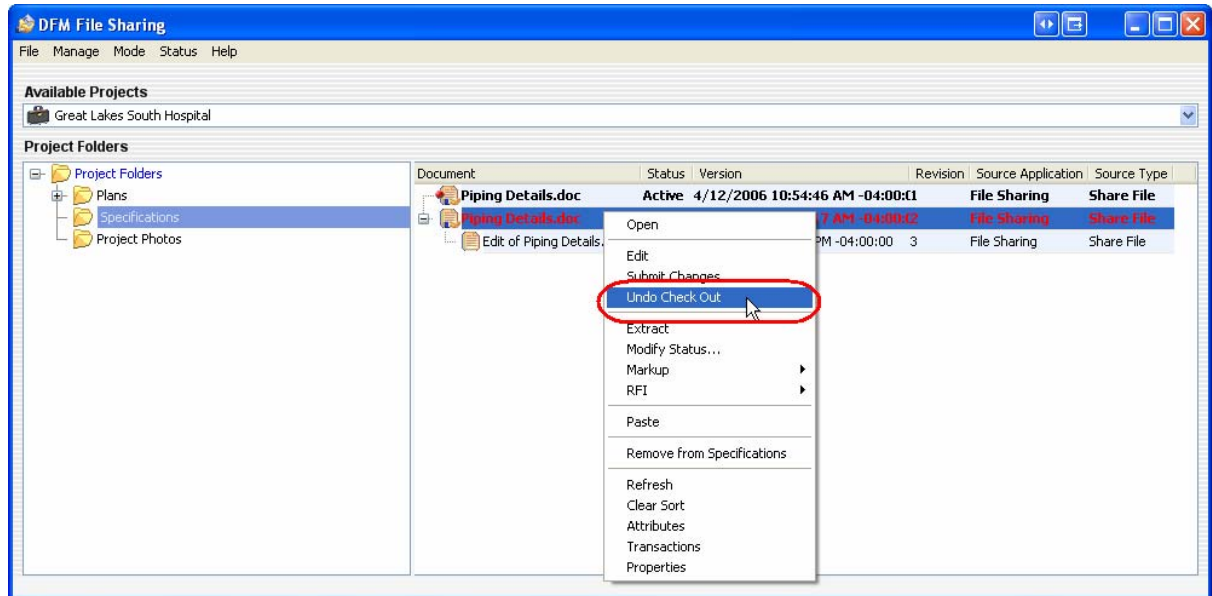
The document is checked in as a new version and is available for others to edit or access. Previous versions are still in PDM and marked with a red dot, indicating that they are not current. (Depending on the folder properties, old versions of a document may not be displayed.)



Undoing a Checkout

You can undo a checkout if you decide that the checkout was not necessary.

To undo a checkout, right click on the document in red in Manage Documents and select Undo Checkout.

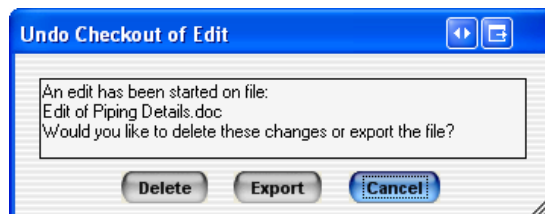


If you made and saved changes to the document already, you will be asked if you want to delete the changes. Do one of the following:

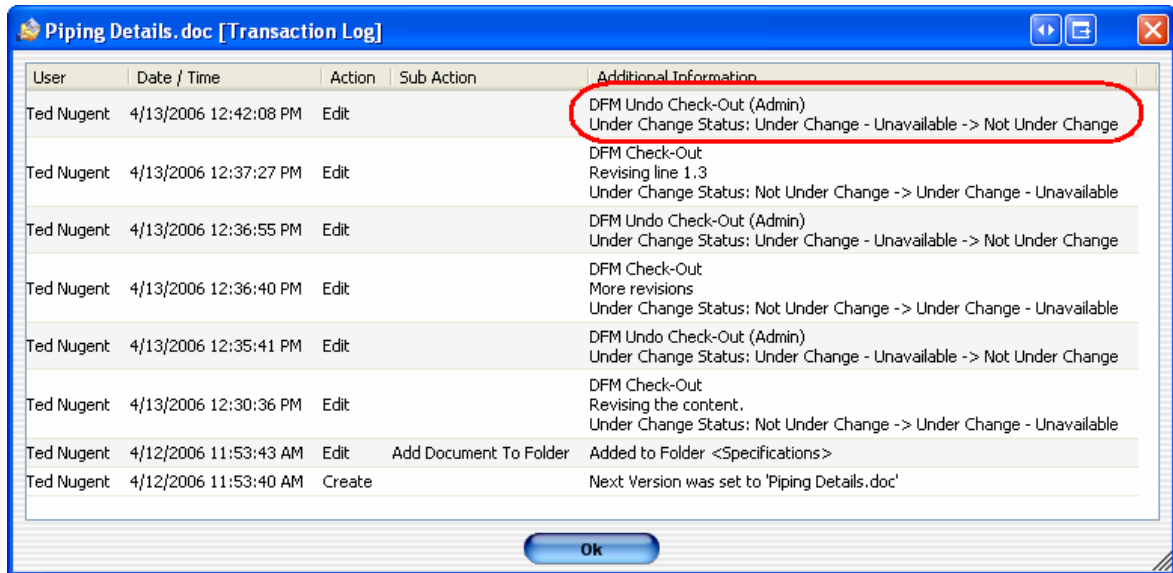
Click Delete to continue with the undo of the checkout and delete all of your changes. All changes that you made will be lost.

Click Export to continue with the undo of the checkout but save the changes in a different location on your machine. The document will lose its connection with PDM Enterprise and be an independent entity.

Click Cancel to cancel the operation and keep the document checked out and under change.



If you clicked Delete or Export, the checkout is undone. The action will still be recorded in the transaction log. (For more information on the transaction log, see the “Viewing Document Transactions” section of this guide.)



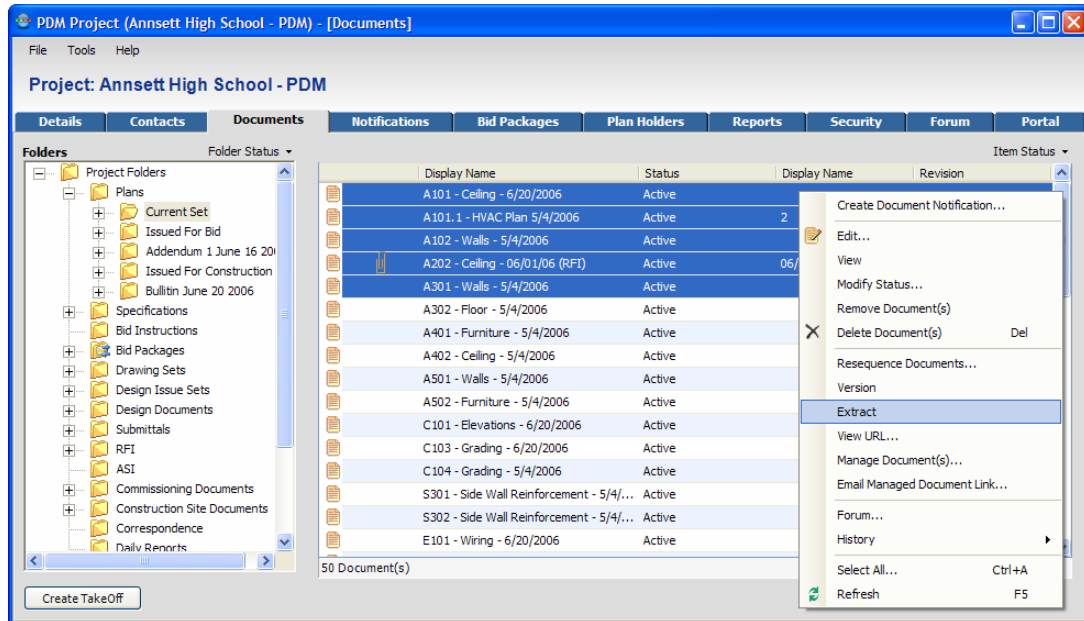
User	Date / Time	Action	Sub Action	Additional Information
Ted Nugent	4/13/2006 12:42:08 PM	Edit		DFM Undo Check-Out (Admin) Under Change Status: Under Change - Unavailable -> Not Under Change
Ted Nugent	4/13/2006 12:37:27 PM	Edit		DFM Check-Out Revising line 1.3 Under Change Status: Not Under Change -> Under Change - Unavailable
Ted Nugent	4/13/2006 12:36:55 PM	Edit		DFM Undo Check-Out (Admin) Under Change Status: Under Change - Unavailable -> Not Under Change
Ted Nugent	4/13/2006 12:36:40 PM	Edit		DFM Check-Out More revisions Under Change Status: Not Under Change -> Under Change - Unavailable
Ted Nugent	4/13/2006 12:35:41 PM	Edit		DFM Undo Check-Out (Admin) Under Change Status: Under Change - Unavailable -> Not Under Change
Ted Nugent	4/13/2006 12:30:36 PM	Edit		DFM Check-Out Revising the content. Under Change Status: Not Under Change -> Under Change - Unavailable
Ted Nugent	4/12/2006 11:53:43 AM	Edit	Add Document To Folder	Added to Folder <Specifications>
Ted Nugent	4/12/2006 11:53:40 AM	Create		Next Version was set to 'Piping Details.doc'

Ok

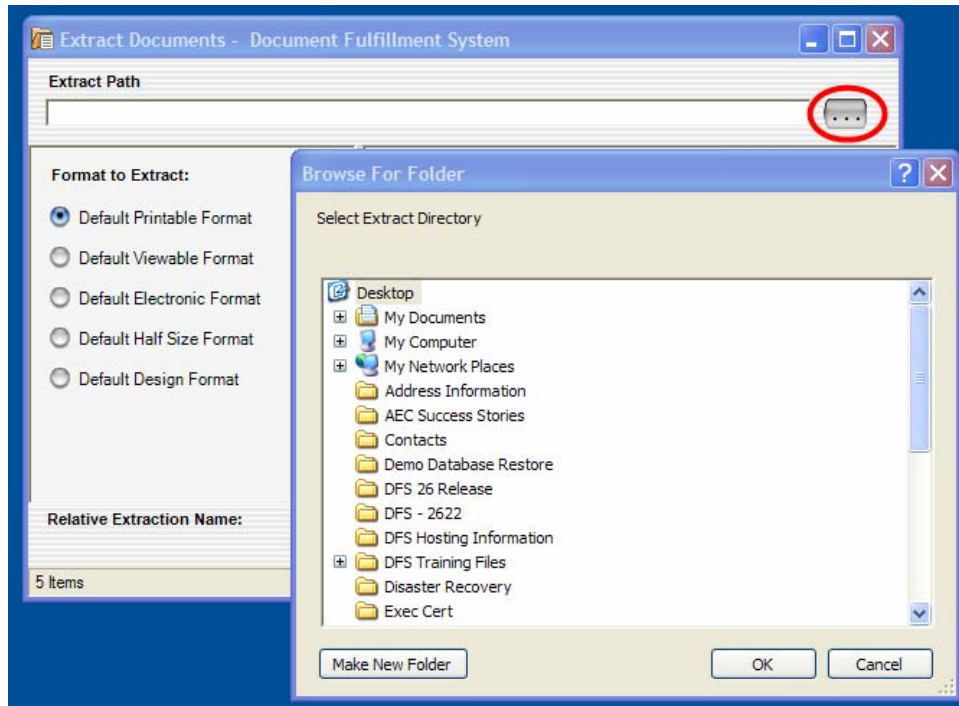
Extracting Documents

You can extract documents out of the PDM Vault and put in on a drive of your choice. In doing so, the document will lose its connection with PDM Enterprise and be an independent entity. Consequently, it will lose all version control.

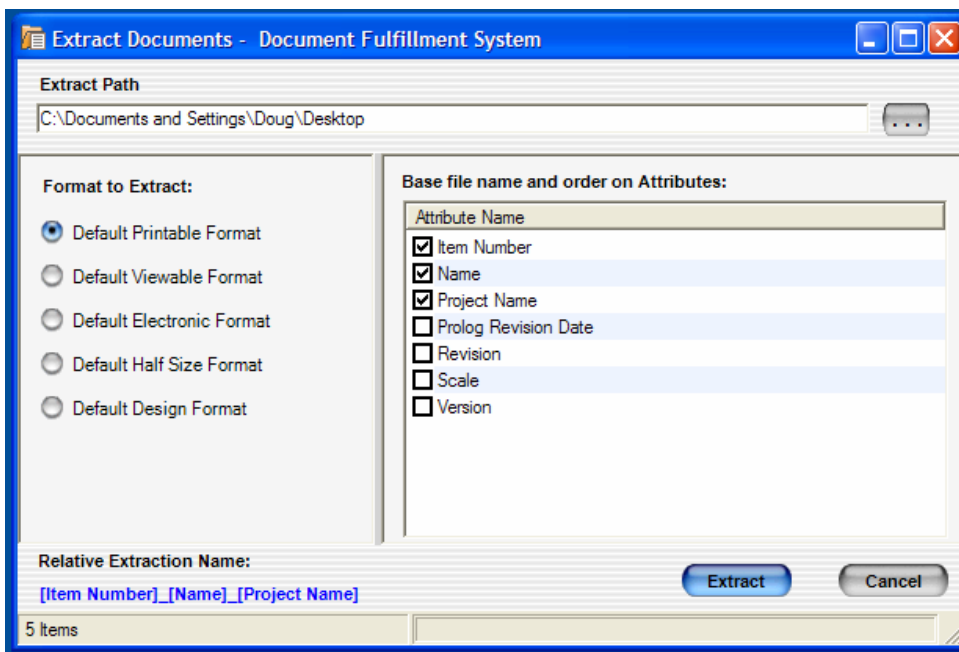
To extract a document, go to the main documents tab, or the project Documents tab. Select the folder that contains the documents to be exported. Right click on the document and select Extract.

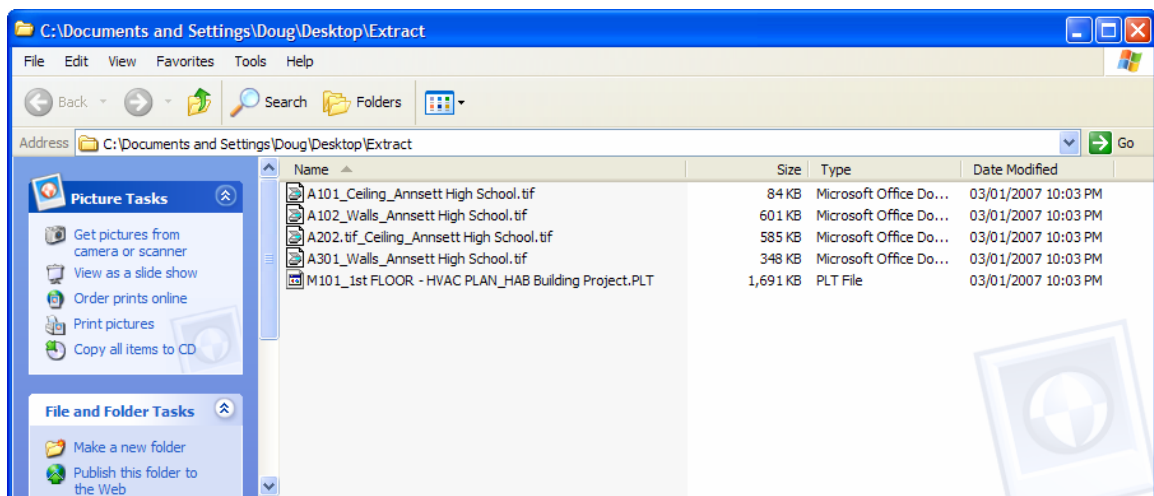
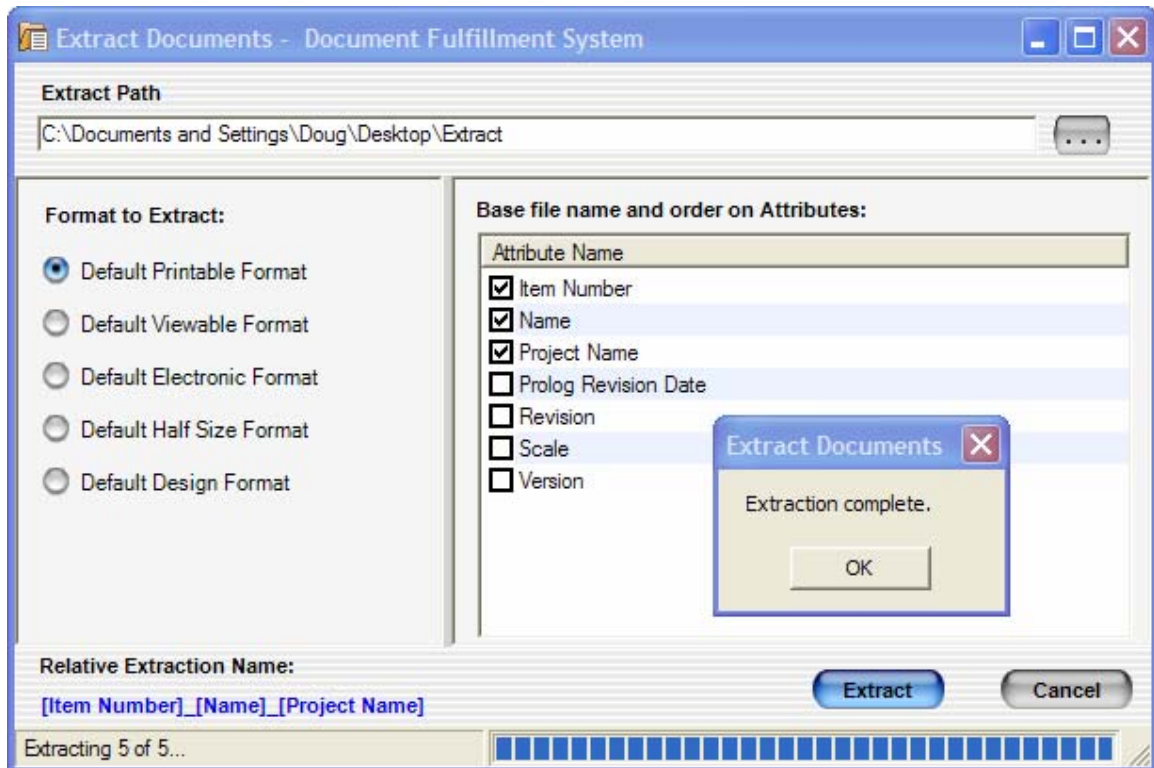


Select the folder in which you want to place the extracted documents and click OK.



You will be asked which document type to extract and how the files should be named. Click on the appropriate format and the name fields and click Extract.

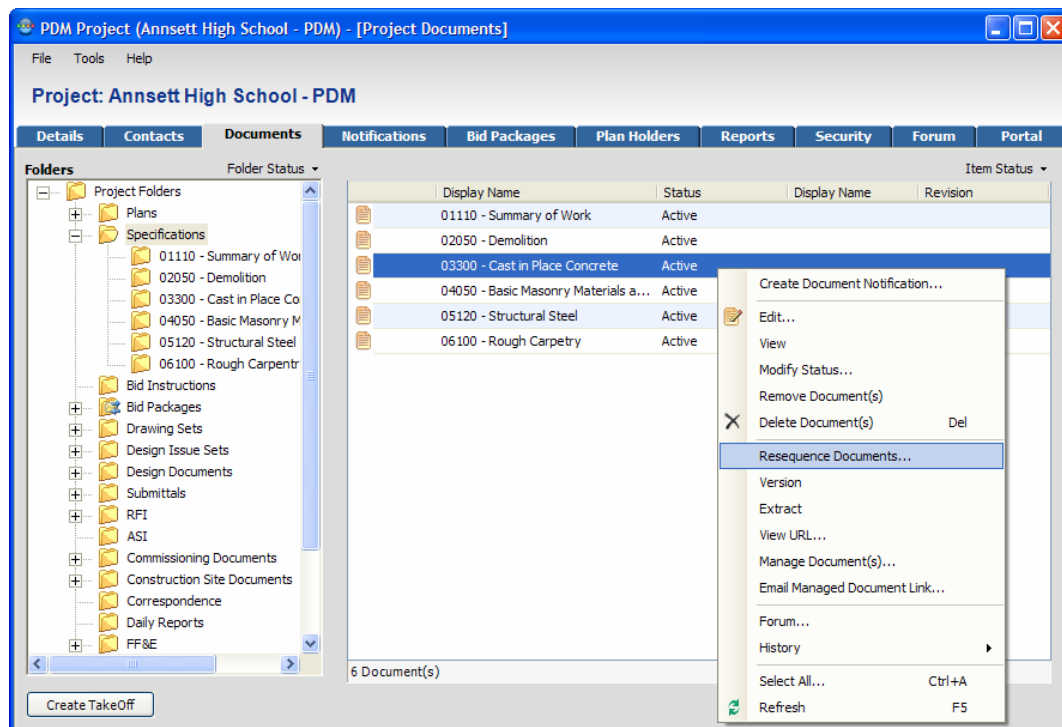




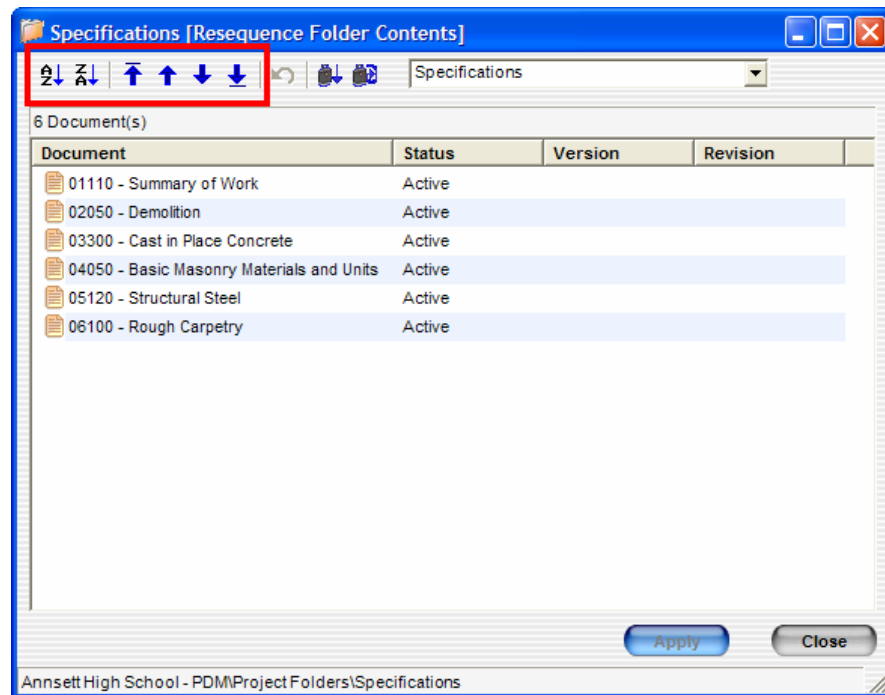
Re-sequencing Documents

You can set the sequence of documents if they need to be in a different order. Sequencing is different than sorting. Sorting is a temporary order for viewing and is done by clicking on the column header. Sequencing is actually changing the order of the documents in the database and will affect how they are displayed on the web portal and in Manage Documents for all users. It will also set the print order.

To sequence documents, right click on the folder that contains the documents you want to sequence and click Resequence Documents.



Drag the documents to the order in which you want them. You can also use the up and down arrow keys. To use a sort, click on a column header. Multiple documents can be selected at once by using the Ctrl and Shift keys while clicking.



Click Apply to save the changes.

The documents will be displayed in the new sequence.

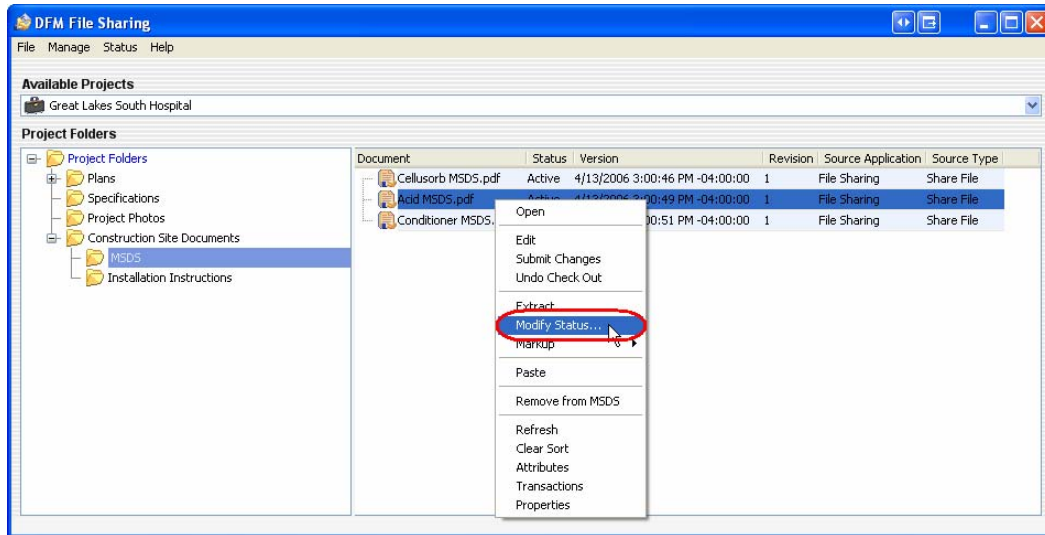
Document	Status	Version	Revision
06100 - Rough Carpetry	Active		
01110 - Summary of Work	Active		
02050 - Demolition	Active		
03300 - Cast in Place Concrete	Active		
04050 - Basic Masonry Materials and Units	Active		
05120 - Structural Steel	Active		

Notice the document with the highest value is first in the list!

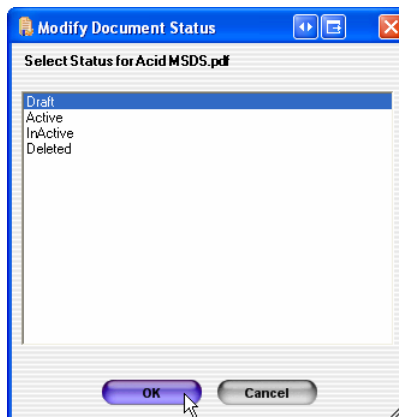
Modifying Document Statuses

You can modify the status of a document if you need to make a document Active, Draft, Inactive, or Deleted. (Depending on the PDM server, Inactive and Deleted may not be available.) You can modify multiple files at one time. Only Active documents are displayed on a web portal.

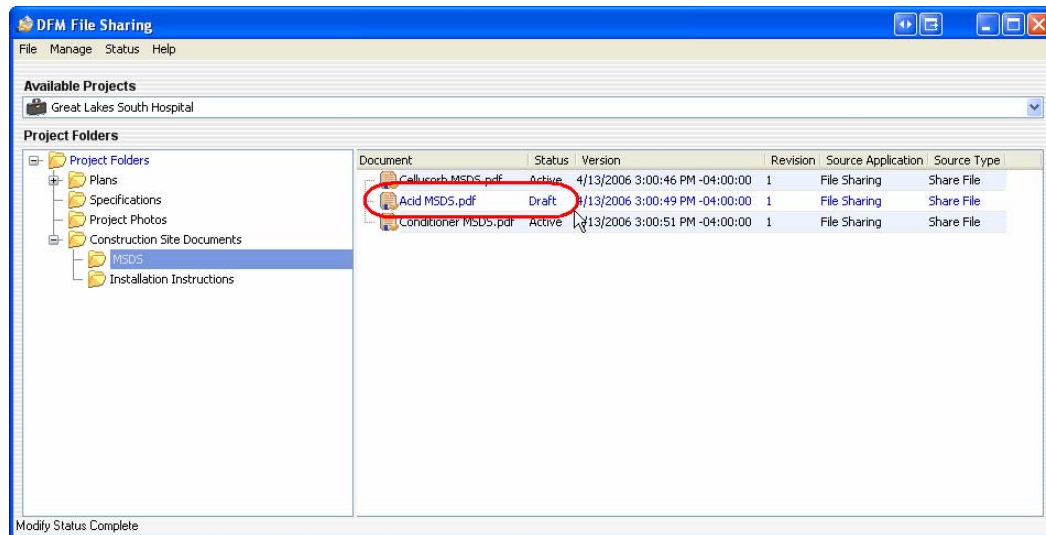
To modify the status of a document, right click on one or more documents and select Modify Status.



Select the Status that you want the document to be and click OK.



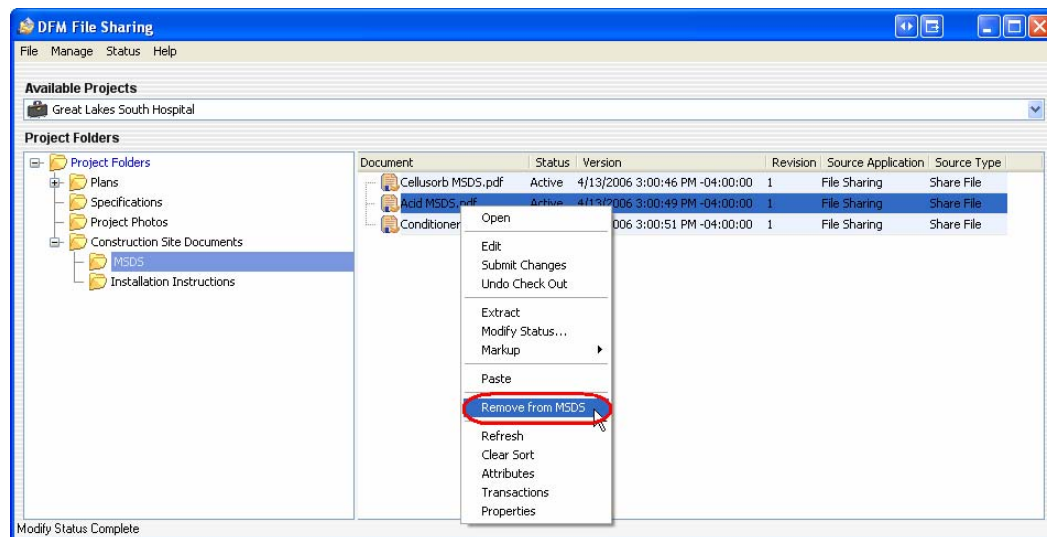
The document status is changed. Draft documents display in blue. Inactive and Deleted documents display in gray (or they may not display at all).



Removing Documents From a Folder

If you no longer need a file in a folder, you can remove it. Removing a document from a folder does not delete the document out of the PDM Vault; it simply removes it from the folder. If you remove a document that is only contained in one folder, you will not be able to access it with PDM Enterprise Manage Documents. PDM administrator can restore the document using the administrator tools.

To remove a file or multiple files from a folder, right click on the file(s) and select Remove From.



The document is removed from the folder.



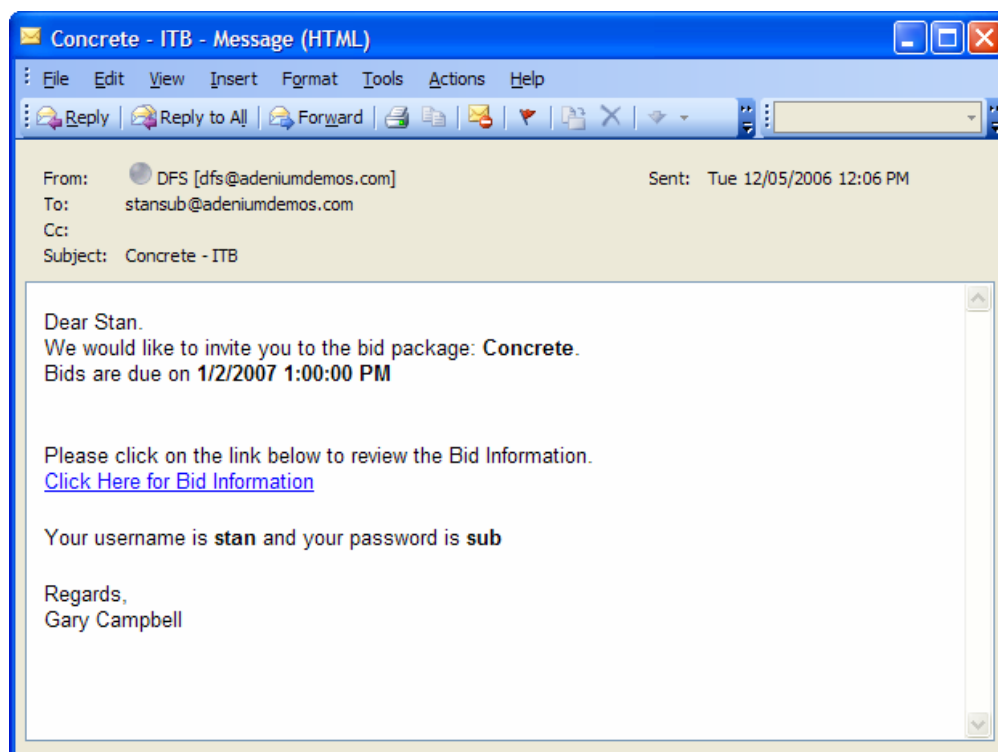
MANAGING THE BIDDING PROCESS

Using PDM, you can efficiently manage the bidding process. You can easily invite potential bidders to prequalify by sending them an invitation. They can enter all of their prequalification information online using a PDM web form. The information is stored in PDM and you can view the prequalification information that they submitted and signify if they are prequalified or not.

Once prequalified, you can create a bid package with the plans and specs that you want to send out to bid. You can create as many bid packages as needed for the various disciplines. You can send out an email or fax invitation to bid on a project to any contact that you have in the system.

When the invitee receives the email or fax, they can view the bid documents online, order prints, create electronic takeoffs, or instant print the documents. They then respond to the invitation where their responses are automatically stored in PDM for you to review.

You can run bid package reports and award the bids. All of this information is fully tracked and managed with PDM.



Prequalifying Bidders

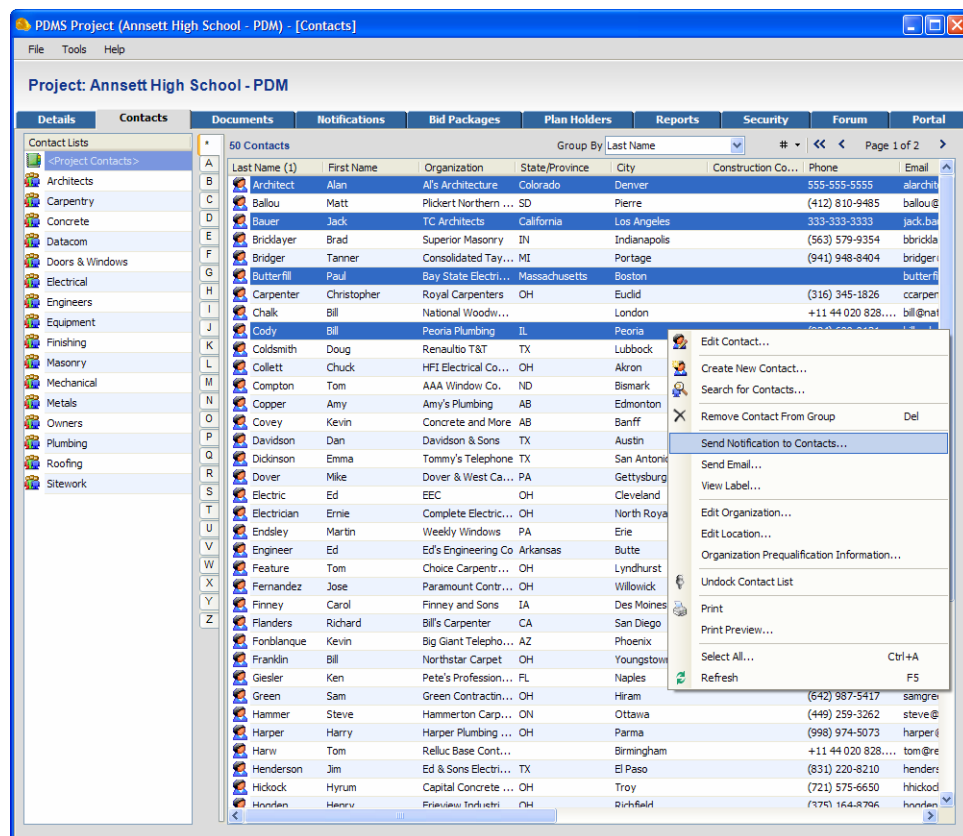
The first step in the bid process is to prequalify your bidders.

Inviting Potential Bidders to Prequalify

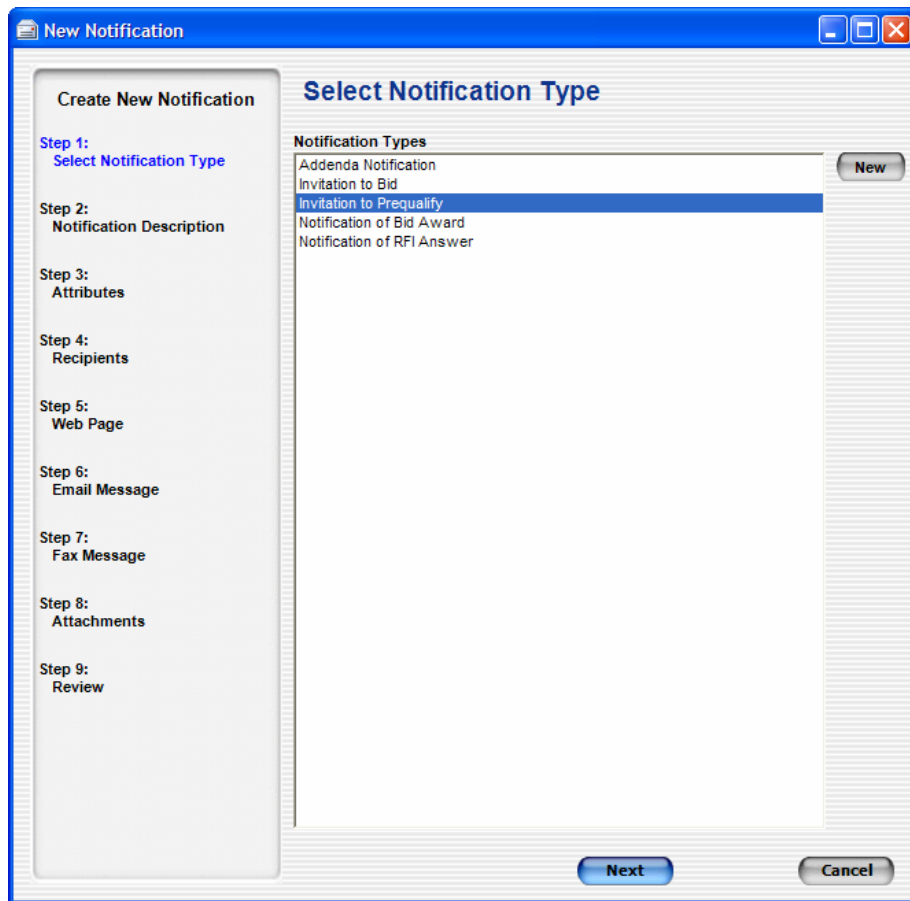
To prequalify your potential bidders, you can use PDM to send them an email notification asking them to log onto a website and fill out the prequalification form. PDM notifications allow members of the preconstruction team to communicate information back and forth with potential bidders.

PDM allows you to define a pre-design “prequalification” notification with the appropriate graphics and text messages for requesting subcontractors to pre-qualify.

To send a prequalification notification, on the **Contacts** tab, select the contacts to whom you want to send the invitation. Right click and select the **Send Notification to Contacts** option.



The next window displays the predefined notification types. PDM allows you to define an unlimited number of notification types. Each notification type can have its own set of attributes, email, fax, and a Web text and graphics. Normally you will have one or more notification types were prequalification.



When the **Select Notification Type** window is displayed, click on the **Invitation to Prequalify** notification type. Click **Next**.

The next screen allows you to enter information describing the notification and when it should be sent.

You can define the scheduled date and time that the notification will be sent. This allows you to set the prequalification notification up before it is to be sent.

The screenshot shows a 'New Notification' wizard window with a blue title bar and standard Windows window controls. On the left is a vertical sidebar titled 'Create New Notification' containing steps 1 through 9. Step 2, 'Notification Description', is highlighted in blue. The main area is titled 'Description' and contains three sections: 'Notification Information' with a dropdown for 'Selected Notification Type' (set to 'Invitation to Prequalify'), a text field for 'Display Name' (containing 'Pharam Prequal'), and a text area for 'Description' (containing 'The prequal for Subguard protection on major Pharma project'); 'Release / Security Information' with a dropdown for 'Status' (set to 'Active') and three date/time pickers for 'Create Date', 'Release Date', and 'Expire Date'; and 'Delivery Information' with a dropdown for 'Scheduled Date / Time' (set to '1/21/2007' and '12:00 AM'), text fields for 'Reply To Email Address' (containing 'Dbower@adeniumsystems.com') and 'CC Email Address', and a 'Fax Provider' section with fields for 'Name', 'Account Email Address', and 'Account Password'. At the bottom are 'Previous', 'Next', and 'Cancel' buttons.

Enter a **Display name** and **Description**.

Set the status to **Active**, and schedule a date and time that the notification will be sent.

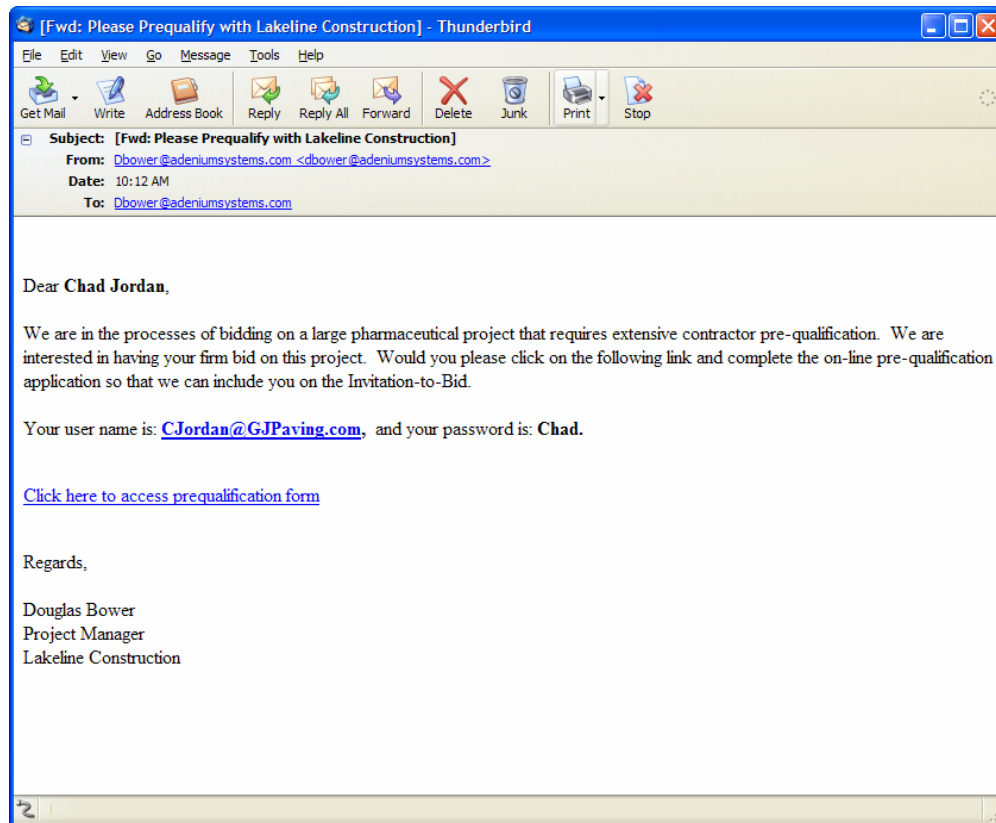
Enter a **Reply To Email Address** and **CC Email Address**.

Enter the **Fax Provider** information if you are sending some notifications by fax.

Click **Next**.

Continue through steps 3 to 9 in the wizard and enter the appropriate information. Most, if not all of the steps will be pre-populated with the correct information. When complete, click **Finish**.

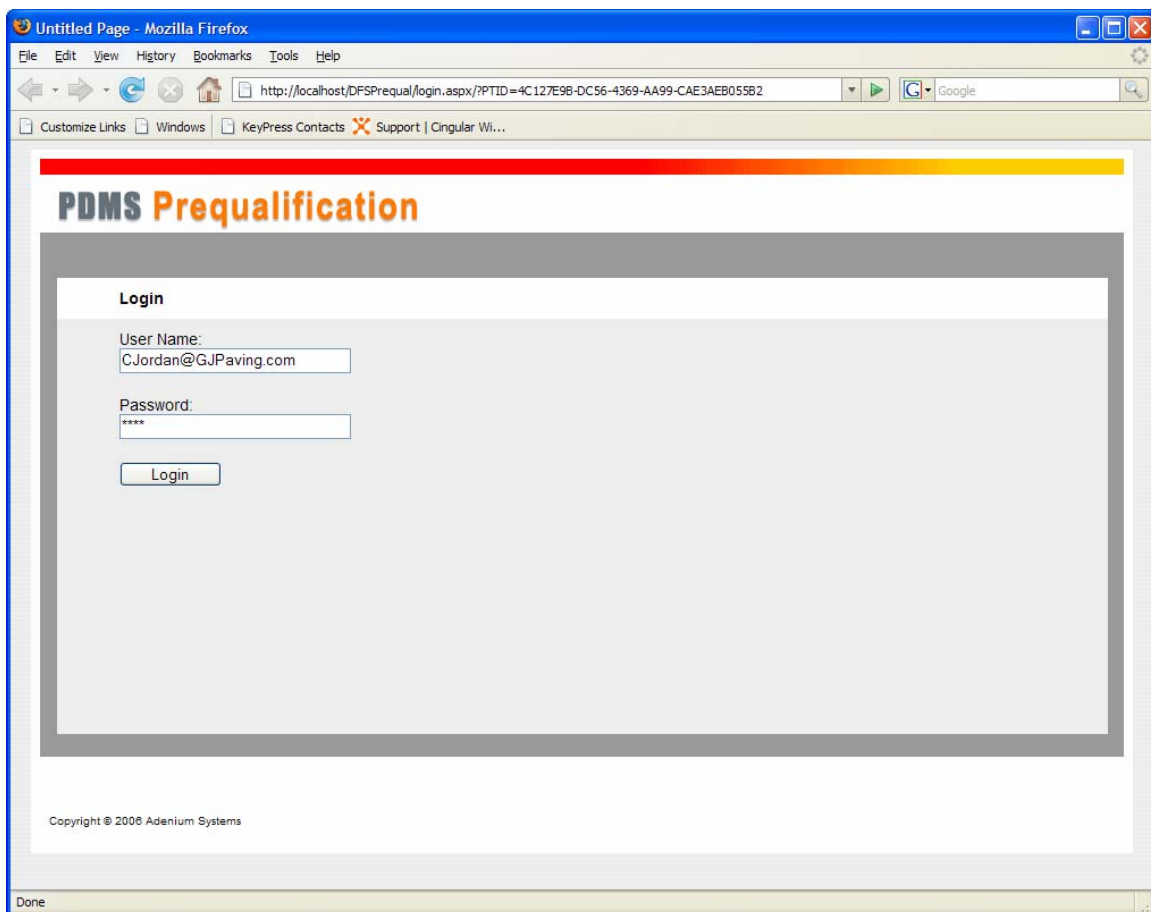
At the date and time specified in the prequalification notification, PDM will send all faxes and emails to the selected recipients.



Collecting Potential Bidder Prequalification Information

When the potential bidder clicks on the link inserted into their email, they will be taken to the prequalification Web application. The email also contains the username and password that the user must enter in order to display existing information contained about the potential bidder

Enter the **User Name** and **Password** specified in the prequalification email.



The screenshot shows a Mozilla Firefox browser window titled "Untitled Page - Mozilla Firefox". The address bar displays the URL: `http://localhost/DFSPrequal/login.aspx/?PTID=4C127E9B-DC56-4369-AA99-CAE3AEB055B2`. The page content features a header with a red-to-yellow gradient bar and the text "PDMS Prequalification" in bold. Below this is a "Login" section with a white background and a gray border. It contains two input fields: "User Name:" with the value "CJordan@GJPaving.com" and "Password:" with masked characters "*****". A "Login" button is positioned below the password field. At the bottom of the page, a small copyright notice reads "Copyright © 2006 Adenium Systems". The browser's status bar at the bottom shows "Done".

The first page displays the contact information for the user who has been invited to prequalify. The user can quickly enter any information that is incorrect, out-of-date or missing.

Enter any information that needs to be added or updated.

Click on the **Extended Profile** tab to continue entering prequalification information.

Welcome to the DFS Prequalification Application - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/DFSPrequal/GeneralInformation.aspx

Customize Links Windows KeyPress Contacts Support | Cingular Wi...

PDMS Prequalification

Welcome, Chad Jordan [Logout](#) | [Help](#)

General Information

General **Extended Profile**

General Information

Company Name *

Contact Name

Address 1

Address 2

City

State / Region / Province

Postal Code

Country

Phone

Fax

* Denotes Required Fields

CSI Information

[Manage](#)

- 02740
- 02750
- 02755
- 02760
- 02785

[Save](#)

Copyright © 2006 Adenium Systems

Done

The remainder of the prequalification information can be entered in various section of the web application. By default PDM allows the potential bidder to enter **Company** information, **Financial** information, **References**, **Resource** information, **Safety and Risk** analysis data, and then **Review and Submit** the application.

Because it may take a significant amount of time for the user to locate and enter the information, they can click **Save and Continue** at any time and close the web application. Once they have the information necessary, they can restart the entire process by clicking on the email link.

Welcome to the DFS Prequalification Application - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/DFSPrequal/Prequal1.aspx

Customize Links Windows KeyPress Contacts Support | Cingular Wi...

PDMS Prequalification

Welcome, Chad Jordan [Logout](#) | [Help](#)

Prequalification Information

General Extended Profile

Company Financial References Resources Safety/Risk Review & Submit

Company History

Year Company Founded	Average Project Size in Place Last Year	Work Under Contract
1985	12,000,000	2,000,000
Total # of Employees	Average Work In Place During Last 5 Years	Uncompleted Backlog
250	3,000,000	1,000,000
Federal Tax ID	Max Preferred Project Size	Preferred Project Locations
243-09-0987	1,000,000	Ohio
☒ Union Shop	Min Preferred Project Size	
	250,000	

License Information

State	License Number	Expiration
Ohio	OH-23872-P-009	1/1/2008

Business Classification (Certification Number)

☒ MBE ☒ DBE ☐ WBE ☐ VBE ☐ HUB ☐ SBE

[Save & Continue >>](#)

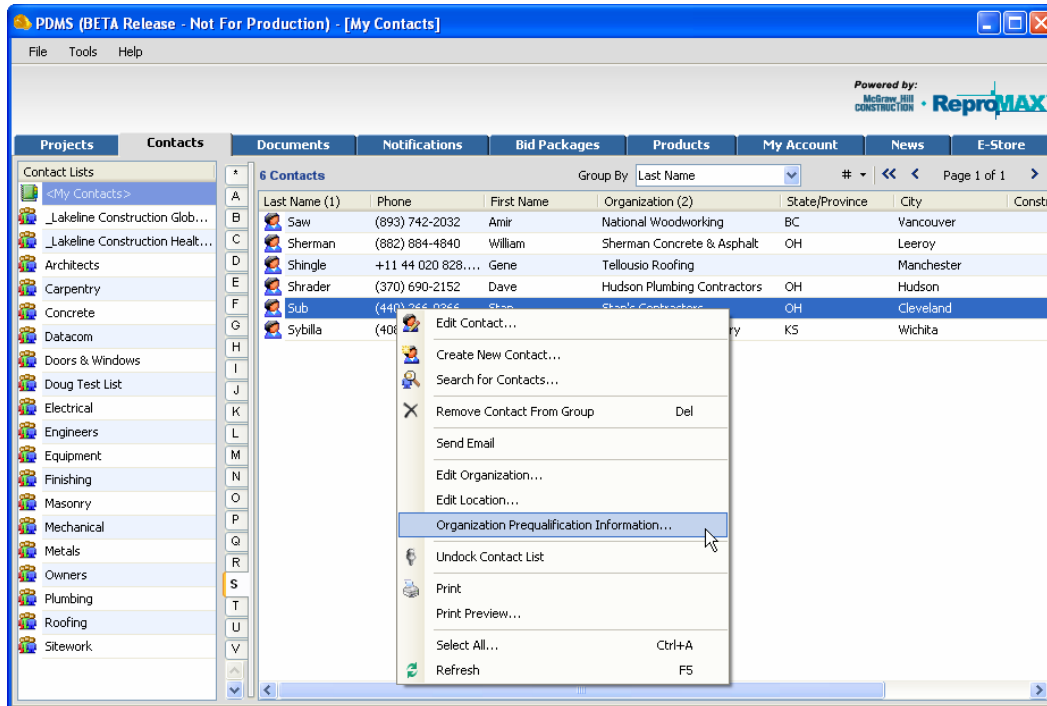
Copyright © 2006 Adenium Systems

Done

Viewing Detailed Prequalification Information for Each Bidder

You can view the prequalification of each contact to whom you sent an invitation to prequalify.

To view a contact's prequalification status, right click on the contact and select **Organization Prequalification Information**.



The prequalification information window opens. There is a tab for each of the screens on the web application form that the customer filled out with all of the corresponding information. You can review this information and edit it as needed.

Stan's Contractors [Pre-Qualification]

Company Information

Company Name Stan's Contractors	Address (Readonly) 1231 High St. Columbus, Ohio (OH) 42342	Contact Information (Readonly) P: 614-555-1234 F: 614-555-4321 E: info@stansubcontracting.com
Contact		

Company | Financial | References | Resources | Safety | **Review**

Company History

Year Company Founded 1990	Average Project Size in Place Last Year \$120,000	Work Under Contract
Total # of Employees 23	Average Work in Place During Last 5 Years \$130,000	Uncomplete Backlog
Federal Id Number 123-0987	Maximum Preferred Project Size \$213,121	Preferred Project Location
☐ Union Shop	Minimum Preferred Project Size \$231	

License Information

State	License No.	Exp. Date

Business Classifications

☐ MBE
 ☐ WBE
 ☒ DBE
 ☐ VBE
 ☐ HUB
 ☐ SBE

Print Ok Cancel

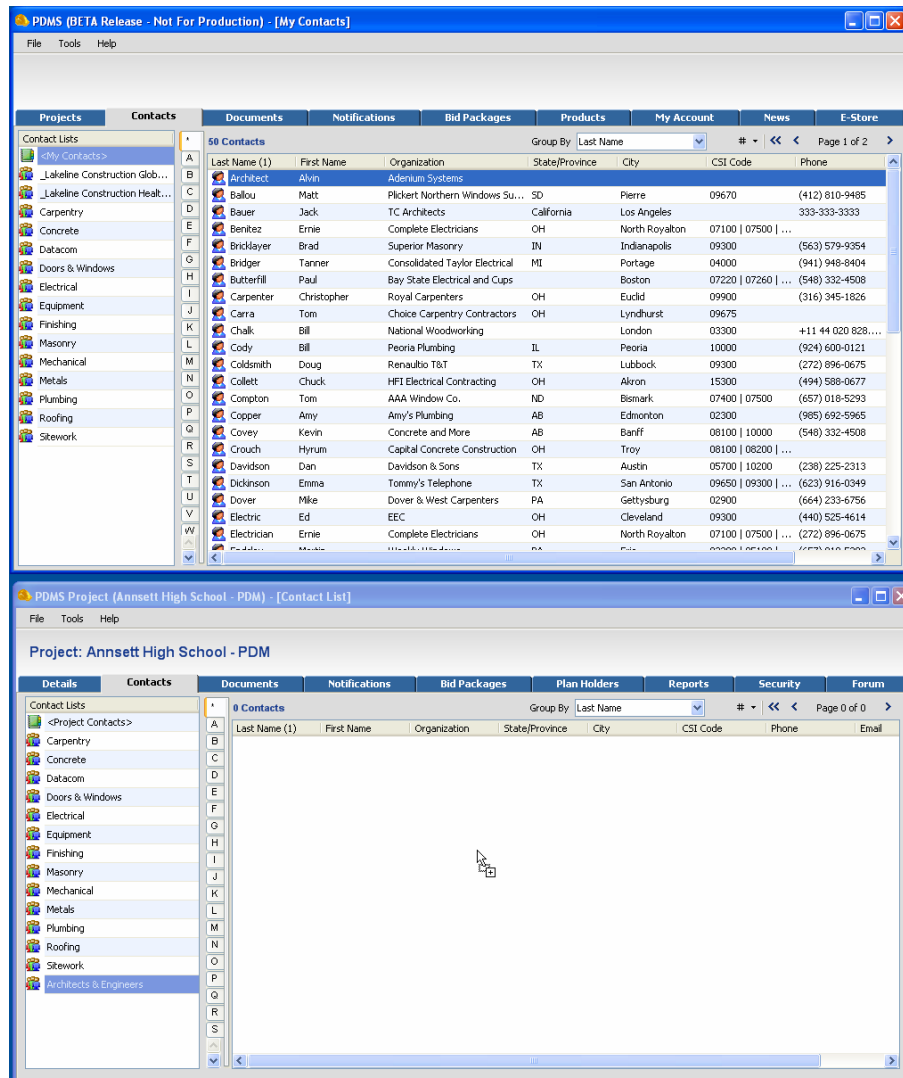
Click the **Review** tab to set whether the person is prequalified or not.

Click **Print** to print the information.

Click **OK** to save and close the information.

Selecting Prospective Bidders for the Project

You can select the qualified bidders and add them to the project.



Open the **My Contacts** Window in PDM and the project **Contacts** window.

Select the appropriate Subcontractor Contact List on project **Contacts** tab.

Select and Drag the subcontractor Contacts from the **My Contacts** window to the appropriate project subcontractor contact list.

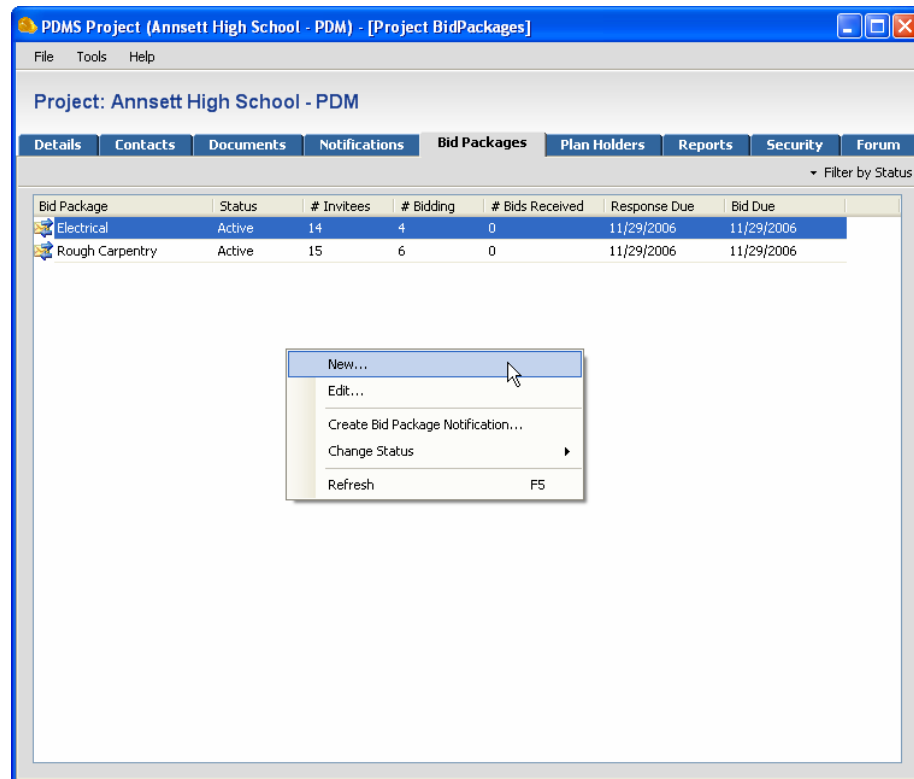
Defining Bid Packages

In many projects the bidding phase is divided into bidding on multiple bid packages. This allows you to break the work required for the projects into smaller, more manageable bids. Each bid package is usually for a type of work, or a phase of the project. The type of subcontractors that would bid on a bid package is usually specialized for the scope of work covered by the Bid package. For example, there is no reason for Painters to bid on a bid package that covers demolition.

Creating Bid Packages

The project administrator can create one or more bid packages for the project. Bid packages tie a group of subcontractors to a select set of project documents and a specific bid date and time. For small projects the project administrator may only create one bid package for all project documents.

To create a bid package, click **the Bid Packages** tab. Right click and select **New**.



On the **General Information** window, enter the information about the bid package. Enter a **Display Name** and **Description**. Set the **Status** to **Active**.

Enter any other information as necessary and click **Next**.

The screenshot shows the 'New BidPackage' window with the 'General Information' tab selected. The left sidebar lists five steps: Step 1: General Information (selected), Step 2: Bid Location, Step 3: Pre Bid Meeting, Step 4: Invitees, and Step 5: Scheduling. The main area contains the following fields and options:

- Bid Package Information:**
 - * Display Name:** Text field containing 'Demolition Package'.
 - Description:** Text field containing 'Blowing it up...'.
 - * Status:** Dropdown menu set to 'Active'.
 - Number:** Text field containing '513-984-0451'.
 - Contact Person:** Text field containing 'Campbell, Gary (garygc@adeniumdemos.x'.
 - Prequal Required:** Checked checkbox.
 - Bid Bond Required:** Checked checkbox.
 - Payment Bond Required:** Unchecked checkbox.
 - Performance Bond Required:** Unchecked checkbox.
 - Estimate:** Text field containing '\$120,000'.
- Scope Of Work:** Text area containing '01565 - Temporary Fence' and '02220 - Demolition'. A 'Set' button is to the right.

At the bottom right are 'Next' and 'Cancel' buttons.

If the bid is to be submitted to a specific location, the location and time information can be defined in the **Bid Location** window. Enter the necessary information and click **Next**.

The screenshot shows the 'New BidPackage' window with the 'Bid Location' tab selected. The left sidebar is the same as in the previous screenshot. The main area contains the following fields and options:

- General Information:** Text field containing 'Project Site'.
- Address:**
 - ☐ Use Location Information
 - Address 1:** Text field containing '123 Main Street'.
 - Phone:** Text field.
 - Address 2:** Text field.
 - Fax:** Text field.
 - Country:** Dropdown menu set to 'UNITED STATES (US)'.
 - Time Zone:** Dropdown menu set to '(GMT+10:00) A.U.S. East'.
 - City:** Text field containing 'Cleveland'.
 - Region:** Dropdown menu.
 - Postal Code:** Text field containing '44115'.

At the bottom are 'Previous', 'Next', and 'Cancel' buttons.

Many times there will be a pre-bid meeting to make sure all bidders start out with a good understanding of the project. Enter the bid submission location information on the **Pre Bid Meeting** window. If there will not be a pre-bid meeting, do not enter any information.

Click **Next**.

Create New Bid Package

Step 1: General Information
Step 2: Bid Location
Step 3: Pre Bid Meeting
Step 4: Invitees
Step 5: Scheduling

Pre Bid Meeting

General Information
Name
Dodge Plan Room

Address
☐ Use Location Information
Address 1
123 Main Street
Address 2

Country
UNITED STATES (US)
City
Cleveland
Region

Postal Code
44115

Meeting
Notes
Be On Time!

Previous Next Cancel

In the **Invitees** window, drag the people to whom you want to send the bid package. Drag the contacts from the **My Contacts** tab main PDM window (or any other contact window).

Enter any goals you have for the bid. This information is for reference only. Click **Next**.

Create New Bid Package

Step 1: General Information
Step 2: Bid Location
Step 3: Pre Bid Meeting
Step 4: Invitees
Step 5: Scheduling

Invitees

Name	Company	City	State	CSI Code(s)
Architect, Alan	Al's Architecture	Denver	Colorado	
Ballou, Matt		Pierre	SD	
Bricklayer, Brad		Indianapolis	IN	

Goals

DBE Goals
20%

MBE Goals
35%

WBE Goals

Bids Received

Units Of Measure

Previous Next Cancel

In the **Scheduling** window, enter the critical dates and times for the bid package.

The screenshot shows the 'New BidPackage' window with the 'Scheduling' tab selected. On the left, a sidebar lists five steps: Step 1: General Information, Step 2: Bid Location, Step 3: Pre Bid Meeting, Step 4: Invitees, and Step 5: Scheduling (which is highlighted in blue). The main area is titled 'Scheduling' and contains a 'Dates' section with several date and time pickers. The 'Release Date / Time' is set to an empty date and 12:00 PM. The 'Bid Document Available Date / Time' is set to 01/30/2007 and 12:00 PM. The 'Response Due Date / Time' is set to 03/08/2007 and 12:00 PM, with a 'Time Zone' dropdown set to '(GMT+10:00) A.U.S. Eastern Stand'. The 'Bid Due Date / Time' is set to 03/28/2007 and 12:00 PM, with a 'Time Zone' dropdown set to '(GMT+10:00) A.U.S. Eastern Stand'. The 'Pre Bid Meeting Date / Time' is set to an empty date and 12:00 PM. There are also pickers for 'Work Start Date' and 'Tentative Work Completion Date'. At the bottom right, there are three buttons: 'Previous', 'Finish' (highlighted in blue), and 'Cancel'. A note at the bottom left of the main area says '* Use Ctrl-0 to clear date properties'.

Create New Bid Package

Step 1:
General Information

Step 2:
Bid Location

Step 3:
Pre Bid Meeting

Step 4:
Invitees

Step 5:
Scheduling

Scheduling

Dates

Release Date / Time
[] 12:00 PM

Bid Document Available Date / Time
01/30/2007 12:00 PM

Response Due Date / Time
03/08/2007 12:00 PM

Time Zone ☐ Use My Location
(GMT+10:00) A.U.S. Eastern Stand

Bid Due Date / Time
03/28/2007 12:00 PM

Time Zone
(GMT+10:00) A.U.S. Eastern Stand

Pre Bid Meeting Date / Time
[] 12:00 PM

Work Start Date
[]

Tentative Work Completion Date
[]

* Use Ctrl-0 to clear date properties

Previous Finish Cancel

When complete, click **Finish**.

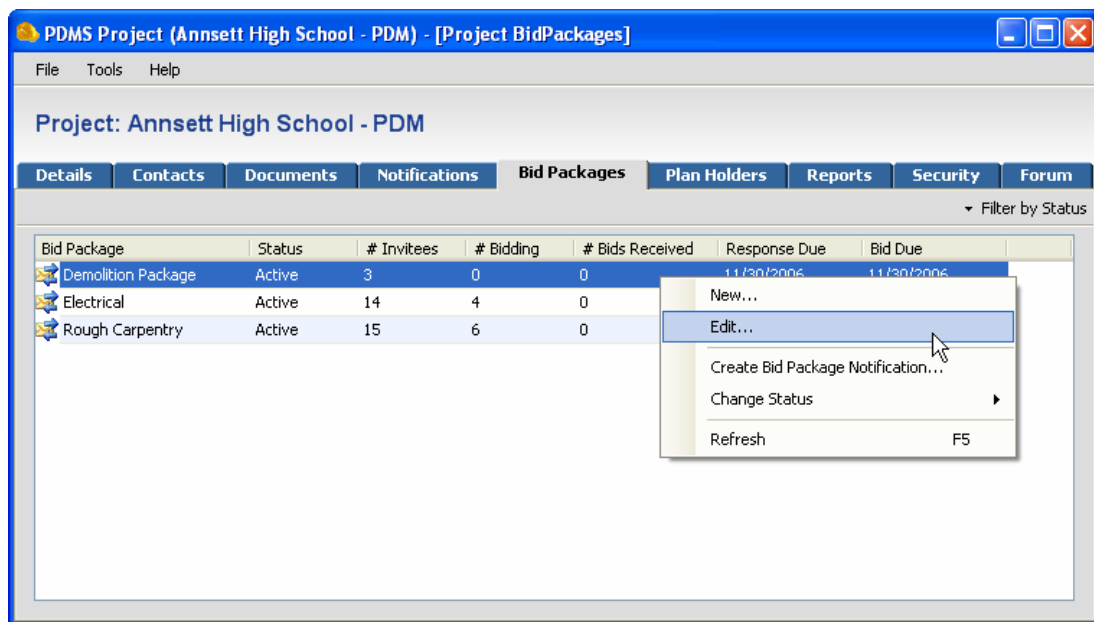
Organizing Bid Documents

One of the biggest strengths of PDM is its ability to manage and organize documents. During the bidding phase the general contractors struggle to make sure that all bidders have the appropriate documents to bid the project. PDM provides a number of very powerful tools to help you better prepare and organize bid documents.

Once the bid package has been created, the project administrator can add a set of folders to the bid package to organize the bid documents.

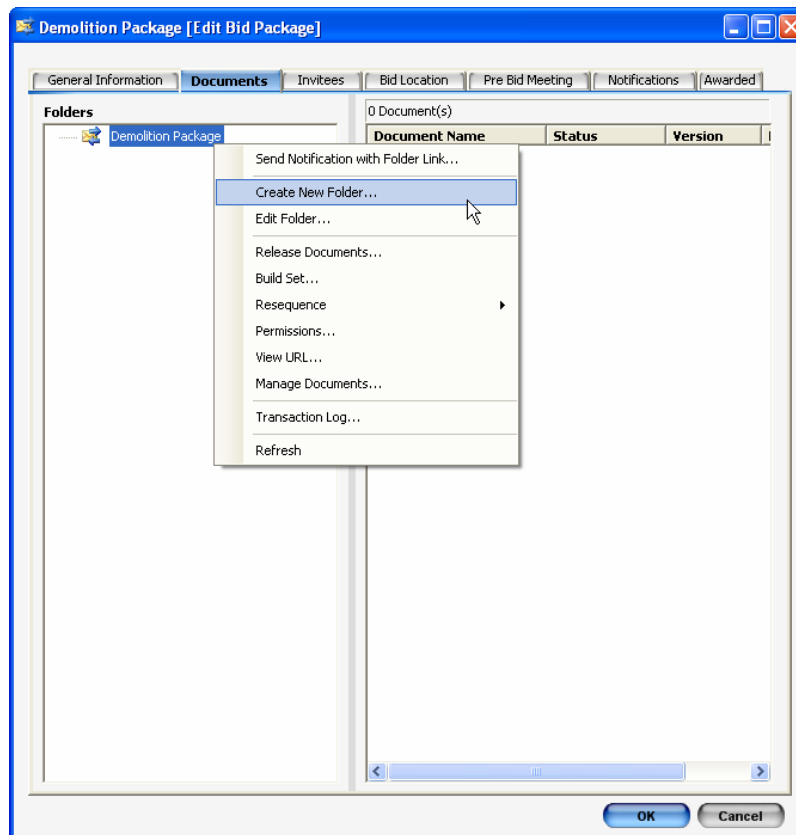
Once the Bid Package is defined, the project administrator can add project documents to the bid package as well as add additional invitees or change bid package settings.

Right Click on the bid package just created, and select **Edit**.

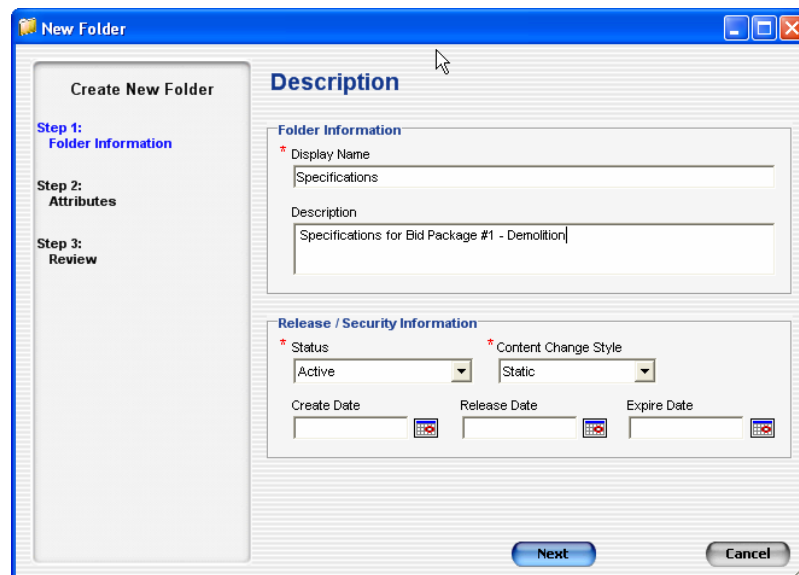


The document tab allows the project administrator to define a folder structure for the bid package documents and add project documents to a bid package.

Right Click on the bid package name and select **Create New Folder**.

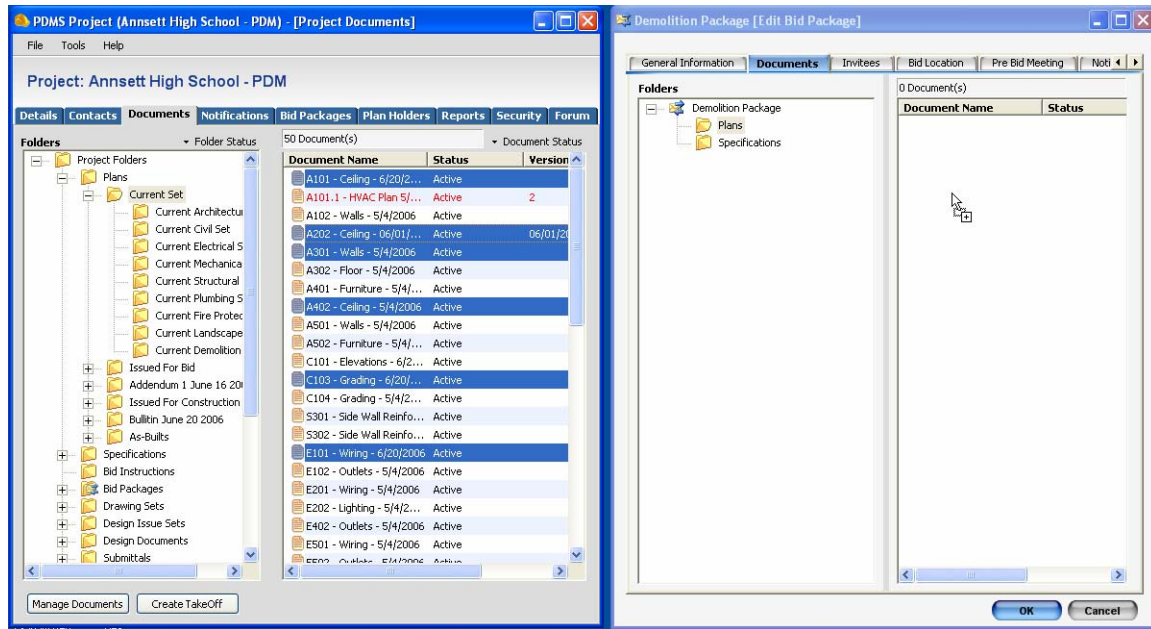


Create the folder by entering a **Display Name** and **Description**. Set the **Status** to **Active**. Complete the wizard and click **Finish**.



Once your folders are created, drag documents from the main Documents tab into the package folders.

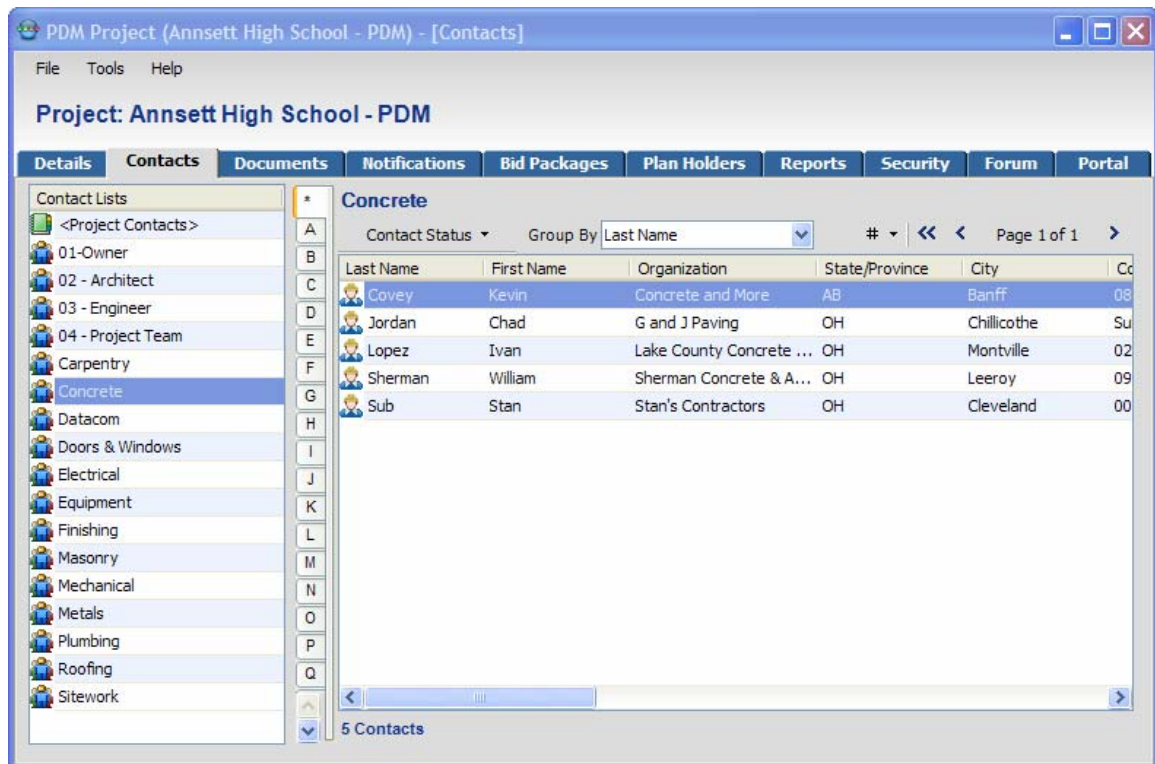
Click **OK**.



Adding Bidders to Bid Packages

Once the bid package has been defined, the project manager needs to begin selecting the potential bidders that they want to invite to bid. This process is critical to assuring that an adequate number of bids are received to assure a competitive bid amount.

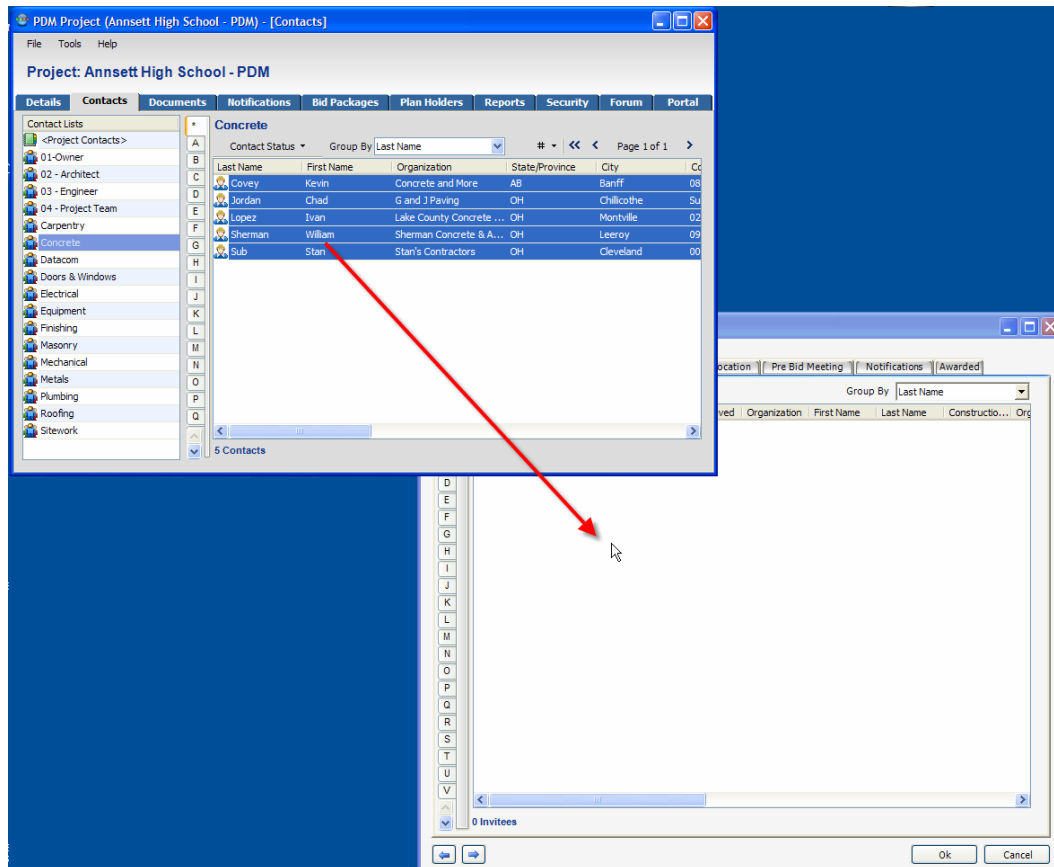
PDM makes it extremely easy for Project Administrators to select potential bidders for each bid package. PDM allows the project administrator to drag and drop contacts from the main contact directory, from the project contacts, or other bid packages.



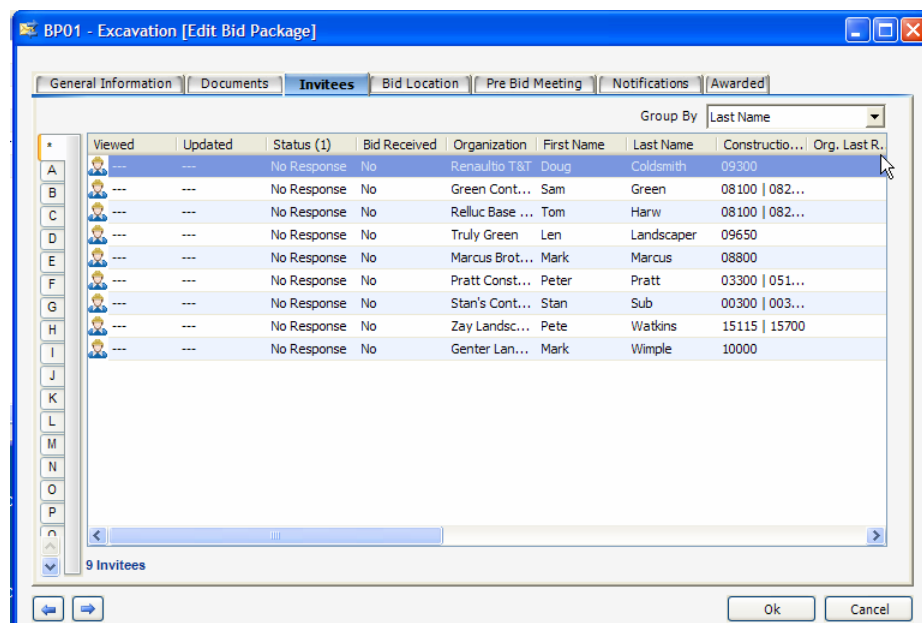
Open the **Contact** tab in the project window.

Undock the contact list

Drag the contacts that you want to send the bid package to from the undocked contact list to the bid package **Invitees** tab.



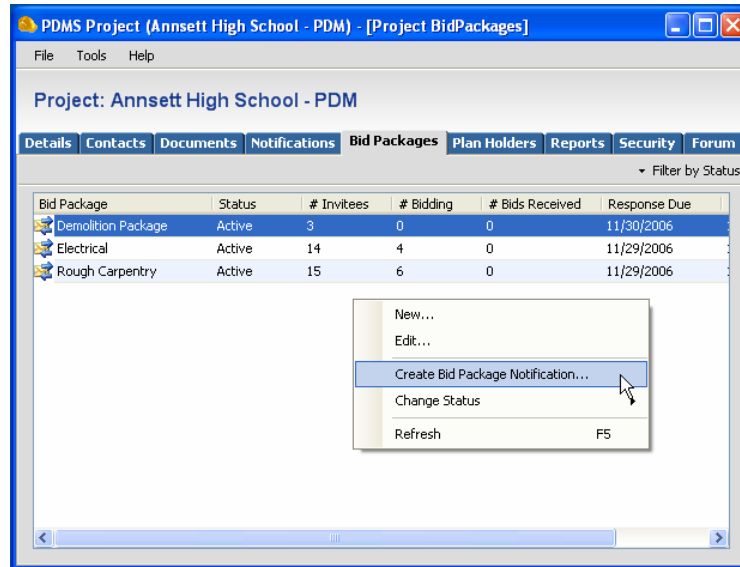
The contacts are added to the bid package.



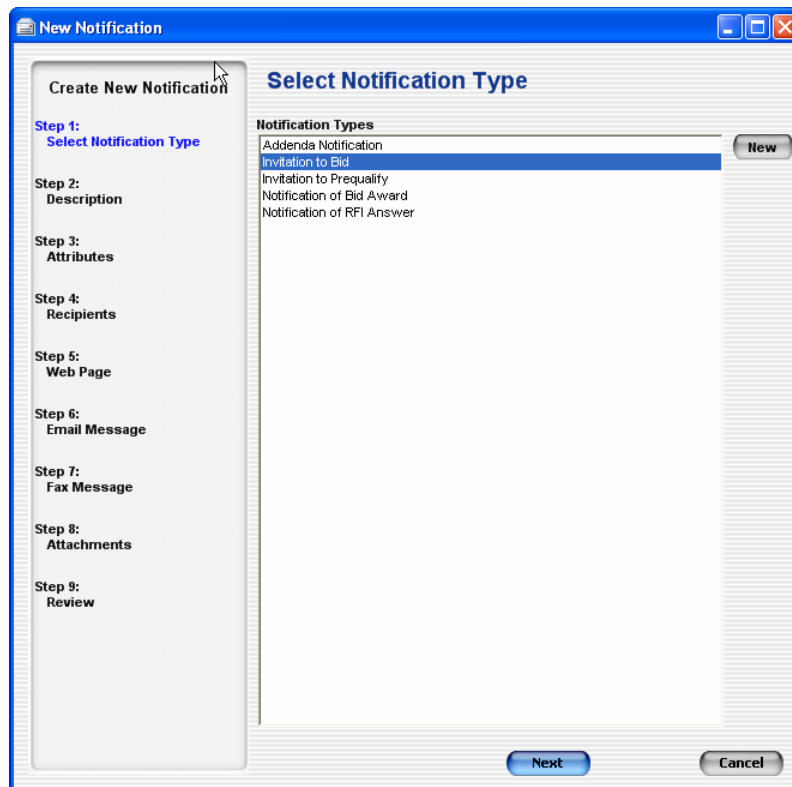
Sending Invitations to Bid for a Bid Package

Once the bid package is created with the folders, documents, and contacts added, you can then send create and send the bid package notification.

To do so, right click in the Bid Packages tab and select **Create Bid Package Notification**.



Select **Invitation to Bid** as the **Notification Type**. Click **Next**.



Enter the **Display Name** and **Description**. Set the **Status** to **Active**.

Enter the **Delivery Information** for when you want to send the invitation and the **Reply To** email address. Click **Next**.

The screenshot shows the 'New Notification' window with the 'Description' tab selected. The left sidebar lists steps 1 through 9, with 'Step 2: Description' highlighted. The main area contains the following fields:

- Notification Information:**
 - Selected Notification Type: Invitation to Bid
 - * Display Name: Demolition Package ITE
 - * Description: Demolition Package bidding
- Release / Security Information:**
 - * Status: Active (dropdown)
 - Create Date, Release Date, and Expire Date (calendar icons)
- Delivery Information:**
 - * Scheduled Date / Time: 12/1/2006 12:00 AM
 - Reply To Email Address and CC Email Address (text boxes)
 - Fax Provider (text box)
 - Name, Account Email Address, and Account Password (text boxes)

At the bottom are 'Previous', 'Next', and 'Cancel' buttons.

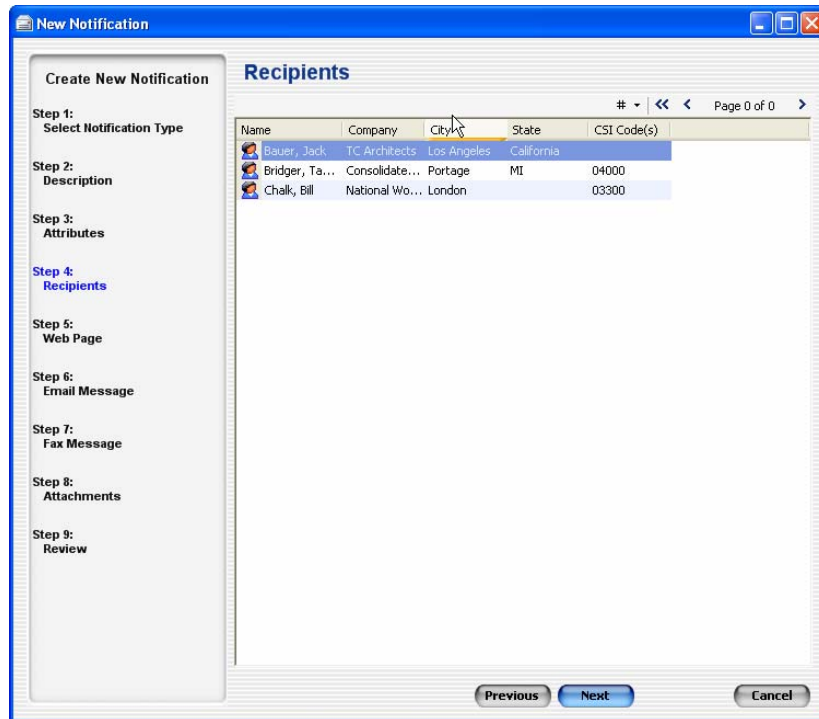
Many of the **Attributes** will be pre-populated. Enter any additional information for the attributes as needed. Click **Next**.

The screenshot shows the 'New Notification' window with the 'Attributes' tab selected. The left sidebar lists steps 1 through 9, with 'Step 3: Attributes' highlighted. The main area contains a table of attributes:

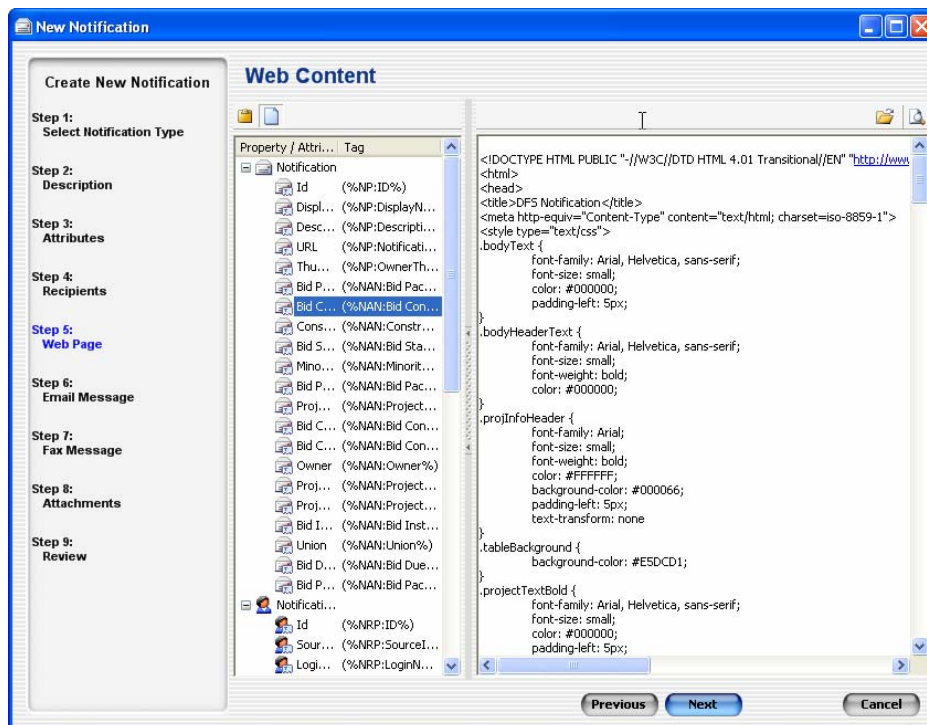
Name	Value
Bid Package	Demolition Bid Package
Bid Contact Email	
Construction Start Date	11/11/2007
Bid Package Description	The First Demolition Job
Project Name	Annsett High School
Bid Contact Phone	440-942-2926
Bid Contact Name	Doug Bower
Owner	Adenium Systems
Project Description	This project is the new Annsett High School on Bucke
Project Number	932HF239
Bid Instructions	
Bid Due Date & Time	
Bid Package URL	http://testserver/dfshost/Default.aspx?Routing=Extern

At the bottom are 'Previous', 'Next', and 'Cancel' buttons.

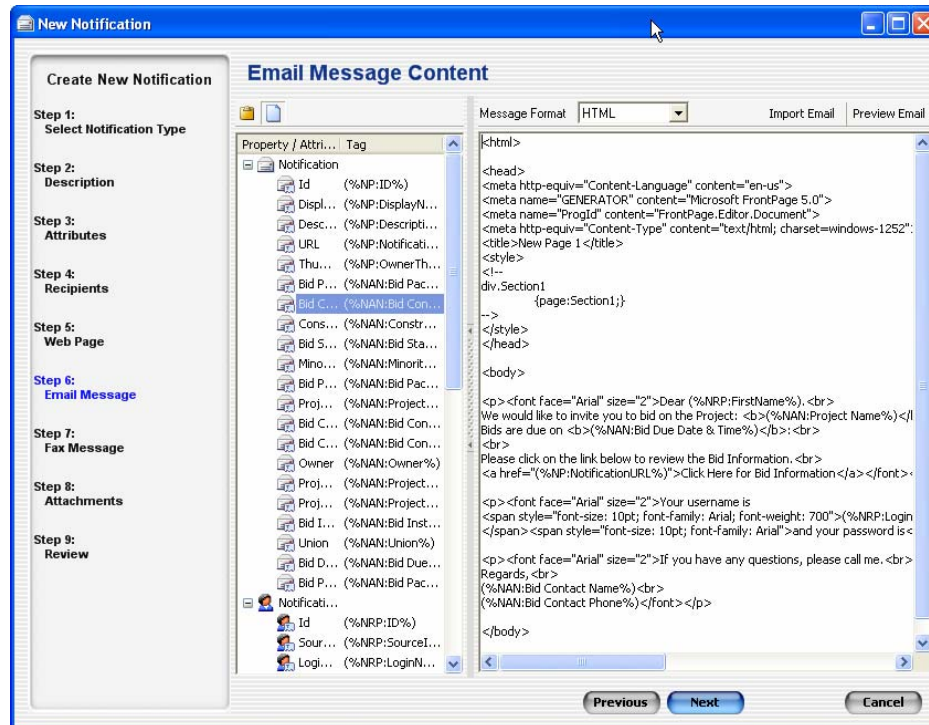
If you need to add or remove recipients, drag them from the main PDM window as needed. The contacts you previously added are already displayed. Click **Next**.



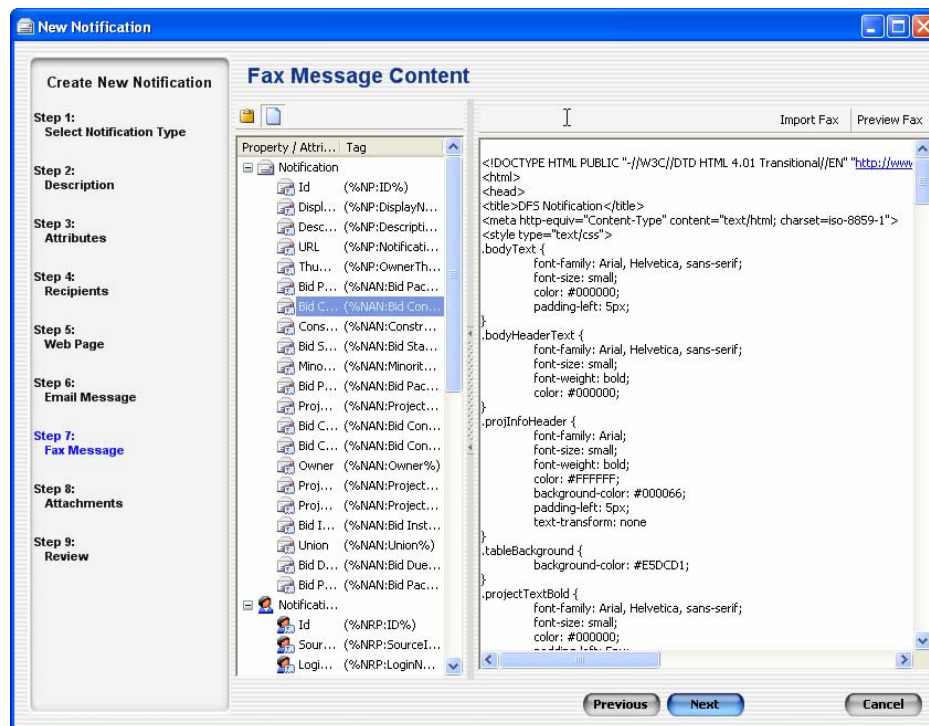
The HTML for the **Web Content** is for the notification. You can edit it as needed. Usually you will not have to edit anything. Click **Next**.



The HTML for the **Email Message Content** can be edited. Click **Preview Email** to see what it will look like. Usually you will not have to edit anything. Click **Next**.



The HTML for the **Fax Message Content** can be edited. Click **Preview Fax** to see what it will look like. Usually you will not have to edit anything. Click **Next**.



Enter any attachments for the notification. Click **Next**.

The screenshot shows the 'New Notification' window with the 'Attachments' tab selected. The left sidebar lists steps 1 through 9, with 'Step 8: Attachments' highlighted. The main area is titled 'Attachments' and contains a table with one header row labeled 'Attachment'. To the right of the table are 'Add' and 'Remove' buttons. At the bottom of the window are 'Previous', 'Next', and 'Cancel' buttons.

Review the notification and click **Finish**.

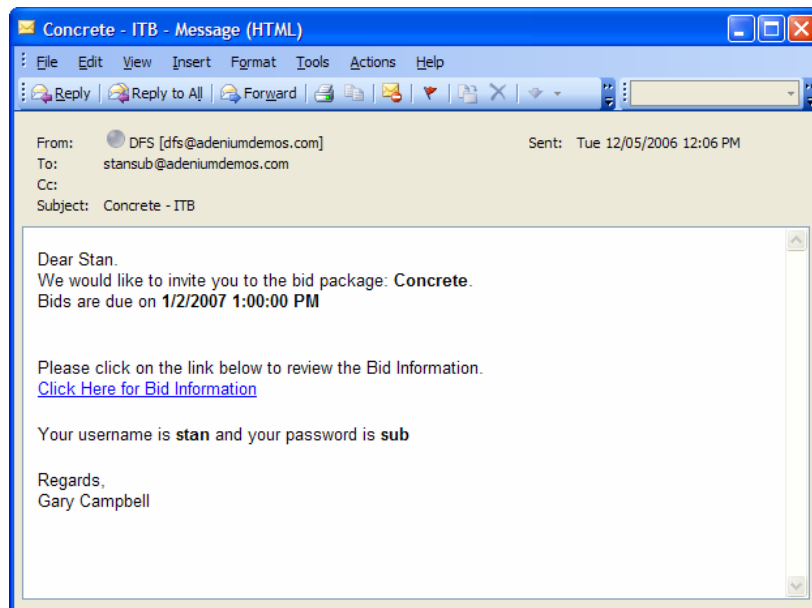
The screenshot shows the 'New Notification' window with the 'Review' tab selected. The left sidebar lists steps 1 through 9, with 'Step 9: Review' highlighted. The main area is titled 'Review' and contains a table with two sections: 'Description' and 'Attributes'. The 'Description' section has five rows: 'Display Name' (Demolition Package ITB), 'Description' (Demolition Package bidding), 'Create Date', 'Release Date', and 'Expire Date'. The 'Attributes' section has ten rows: 'Bid Package' (Demolition Bid Package), 'Bid Contact Email', 'Construction Start Date' (11/11/2007), 'Bid Status', 'Minority', 'Bid Package Description' (The First Demolition Job), 'Project Name' (Annsett High School), 'Bid Contact Phone' (440-942-2926), 'Bid Contact Name' (Doug Bower), 'Owner' (Adenium Systems), 'Project Description' (This project is the new Annsett High School on Buckeye R...), 'Project Number' (932HF239), 'Bid Instructions', 'Union', 'Bid Due Date & Time', and 'Bid Package URL' (http://testserver/dlshost/Default.aspx?Routing=External&...). At the bottom of the window are 'Previous', 'Finish', and 'Cancel' buttons.

Inviting Subcontractors to Bid

When the bid package has been created, the recipients of the invitation to bid will receive an email or fax invitation. They can then go online to view and print the documents and then respond to your invitation.

Subcontractor Receives Email Invitation to Bid

The subcontractor will receive the email with the Invitation To Bid information. A link in the email will take him to the web page.

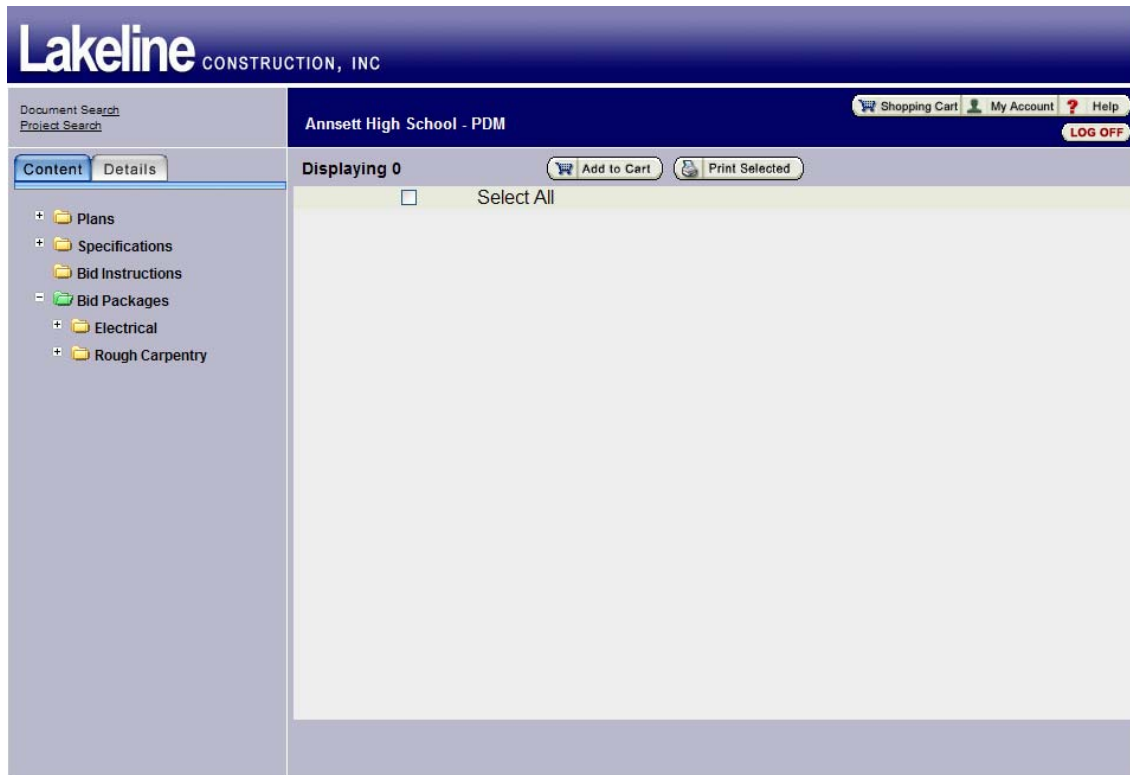


Sub Reviews Bid Package in Online Plan Room

The sub is directed to the web portal that contains the bid packages and documents. When they click on the “Bid Packages” folder, a list of all bid packages that the user has been invited to bid will be displayed in the window on the right, as well as in the tree on the left.

Note: If the Bid Packages folder does not exist, then the user does not have access to any bid packages.

Click the **Bid Packages** folder.



Select one of the bid packages displayed under the “**Bid Packages**” Folder

When a user clicks on one of the bid package folders, the information about the bid package will be displayed in the window on the right. Folders that contain bid package documents will be displayed in the tree below the bid package folder selected.

In the example below, the Electrical bid package information is displayed. There has been two sets of documents issued: Initial Release and Addenda 1.

The screenshot displays the Lakeline Construction, Inc. PDM interface. The header bar is dark blue with the Lakeline logo and 'CONSTRUCTION, INC'. Below the header, there's a navigation bar with 'Document Search' and 'Project Search' links. The main content area is divided into two panels. The left panel, titled 'Content', shows a tree view of project folders: 'Plans', 'Specifications', 'Bid Instructions', 'Bid Packages', 'Electrical', 'Electrical Bid Package - Initial Release', 'Electrical Bid Package - Addenda 1', and 'Rough Carpentry'. The right panel, titled 'Bid Package Details', shows the details for the 'Electrical' bid package. It includes fields for 'Bid Package Name' (Electrical), 'Bid Package Description' (Electrical Bid Package), 'Bid Contact', 'Response Date / Time', 'Construction Codes' (Display Name), 'Bid Time Zone' (A.U.S. Eastern Standard Time), and 'Bid Date / Time'. A 'Bid Response' dropdown menu is set to 'Yes, I will be bidding'. The interface also features a 'Shopping Cart' and 'My Account' link in the top right corner, and a 'LOG OFF' button.

PDM will display the documents that have been assigned to the Bid Package in the window on the right. The user can view, print, or order any document from the bid package.

Lakeline CONSTRUCTION, INC

Document Search
Project Search

Annsett High School - PDM

Shopping Cart My Account ? Help
LOG OFF

Content Details

- Plans
- Specifications
- Bid Instructions
- Bid Packages
 - Electrical
 - Electrical Bid Package - Initial Release
 - Electrical Bid Package - Addenda 1
 - Rough Carpentry

Displaying 1 - 10 of 10

Select All

Available Options

Instant Print Select Item
PRINT

E101 - Wiring - 5/4/2006
[View document details](#) [View document](#)
Wiring

E102 - Outlets - 5/4/2006
[View document details](#) [View document](#)
Outlets

E201 - Wiring - 5/4/2006
[View document details](#) [View document](#)
Wiring

E202 - Lighting - 5/4/2006
[View document details](#) [View document](#)
Lighting

E301 - Lighting - 5/4/2006
[View document details](#) [View document](#)

Subcontractor Replies with bidding intentions

Once the subcontractor has reviewed the documents the General Contractor would like them to respond as to whether they are going to bid. The Subcontractor can select the appropriate response using the combo box in the upper right portion of the window.

Select the same bid package displayed under the **Bid Packages** folder, and click on the folder icon.

The screenshot shows the Lakeline Construction, Inc. web application interface. The top navigation bar includes the company logo and links for Shopping Cart, My Account, Help, and a LOG OFF button. The main content area is titled 'Annsett High School - PDM'. On the left, a sidebar contains a tree view of project documents, including Plans, Specifications, and Bid Packages. The 'Bid Packages' folder is expanded, showing sub-folders like 'Electrical', 'Electrical Bid Package - Initial Release', and 'Electrical Bid Package - Addenda 1'. The 'Electrical' folder is selected. The main content area displays 'Bid Package Details' for the 'Electrical' package. A 'Bid Response' dropdown menu is open, showing options: 'Yes, I will be bidding', 'Pending', 'Yes, I will be bidding', and 'No, I will not be bidding'. The 'Yes, I will be bidding' option is highlighted.

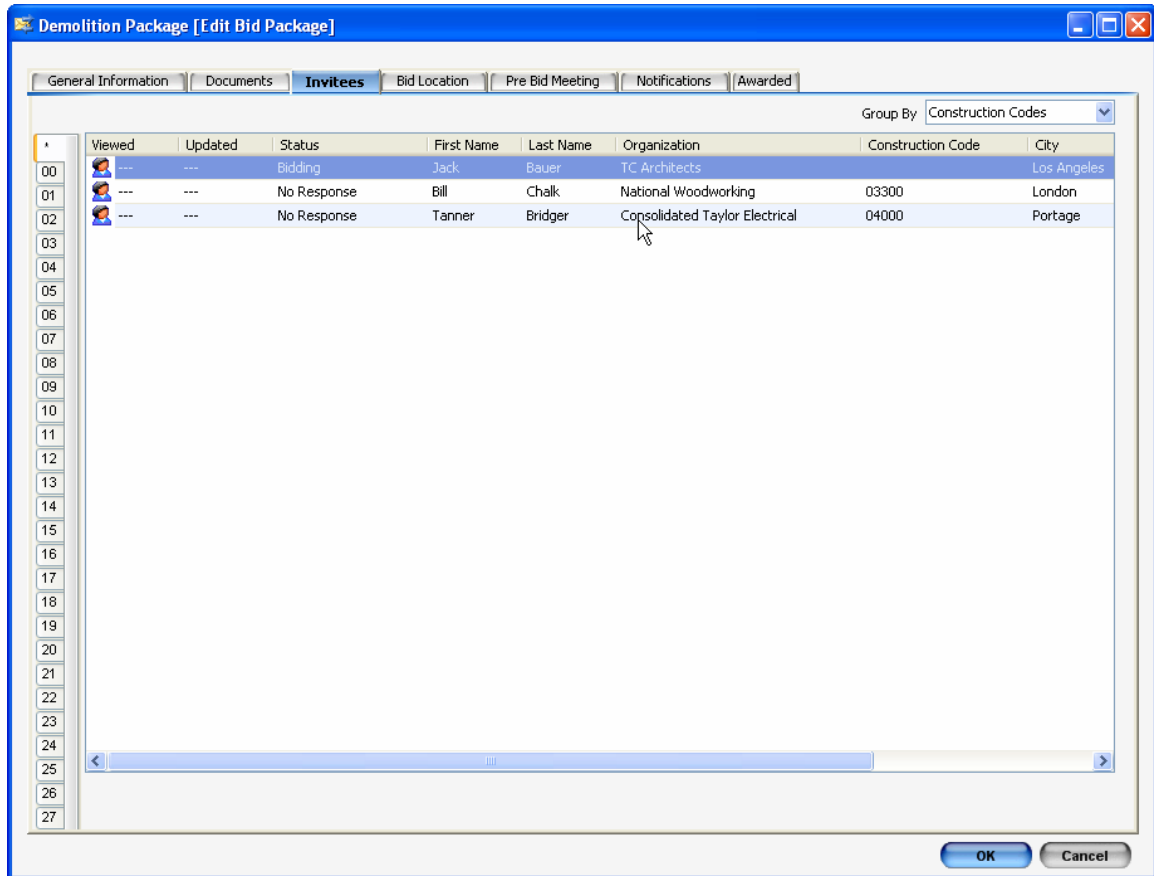
The subcontractor can choose the appropriate response using the pull down menu.

This is a close-up view of the 'Bid Response' dropdown menu. The menu is open, displaying four options: 'Yes, I will be bidding', 'Pending', 'Yes, I will be bidding', and 'No, I will not be bidding'. The 'Yes, I will be bidding' option is highlighted in blue.

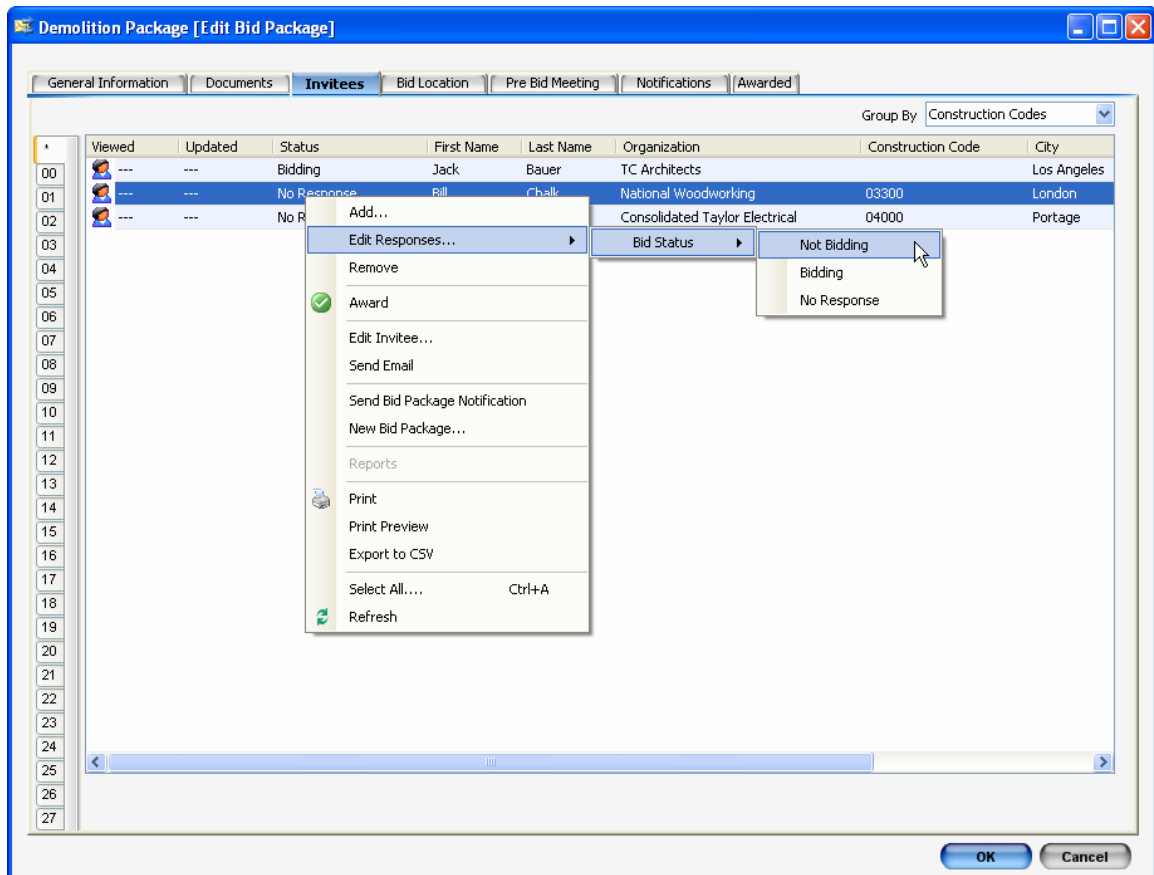
Managing Subcontractor Bid Responses

You can monitor and manage the invitations that you have sent. The Invitee tab in the bid package displays the bidder's status. You can update their responses manually if needed.

Click the **Invitee** tab.



To edit a bidder's responses, right click on the bidder, point to **Edit Responses** and point to **Bid Status**. Select either **Not Bidding**, **Bidding**, or **No Response**.



Reviewing the Bidder Coverage

You can check the bid to determine if adequate bids are going to be received for each bid package. If this project requires a defined level of minority participation then it is also important to review the number and percentage of bidders that will be submitting bids as minorities.

Open the **Bid Package**, and click the **Invitees** tab. Select **Construction Codes** in the **Group By** list. You can then click on the tabs on the left to view the bid coverage and responses from the different disciplines.

	Viewed	Updated	Status (1)	Bid Received	Organization	First Name	Last Name	Constructio...	Org. Last R...	MBE	DBE	WBE
00	---	---	No Response	No	Ed & Sons E...	Jim	Henderson	07100				
01	---	---	No Response	No	Bay State El...	Paul	Butterfill	07220		No	No	No
02	---	---	No Response	No	Bay State El...	Paul	Butterfill	07260		No	No	No
03	---	---	No Response	No	Bay State El...	Paul	Butterfill	07300		No	No	No
04	---	---	No Response	No	Ed & Sons E...	Jim	Henderson	07900				
05	---	---	Bidding	No	Complete El...	Ernie	Electrician	07100				
06	---	---	Bidding	No	Complete El...	Ernie	Electrician	07500				
07	---	---	Bidding	No	Complete El...	Ernie	Electrician	07800				
08												
09												
10												
11												
12												
13												
14												
15												
16												
17												
18												

Bid Package Report

You can run a bid package report to monitor responses and bid information.

To do so, click the **Reports** tab. Right click on the **Bid Package Status Report** and click **Generate**.

This report provides an easy to read listing of every bid for this project. It provides a summary of the entire bid including package name, key dates and summary of current status of the invitees. It provides a detailed list of all the invitees, with their key contact information

Bid Package Status Report

Annsett High School - PDM

Bid Package - Electrical

Description: Electrical Bid Package Status: Bid Location: Headquarters - Cleveland Ohio Response Date: 11/29/2006 2:00:00 AM

Invitees: 14 # Bidding: 4 # Received: 0 Due Date: 11/29/2006 1:00:00 AM

Not Bidding: 3 # No Response: 7

☒ Active

Bidders

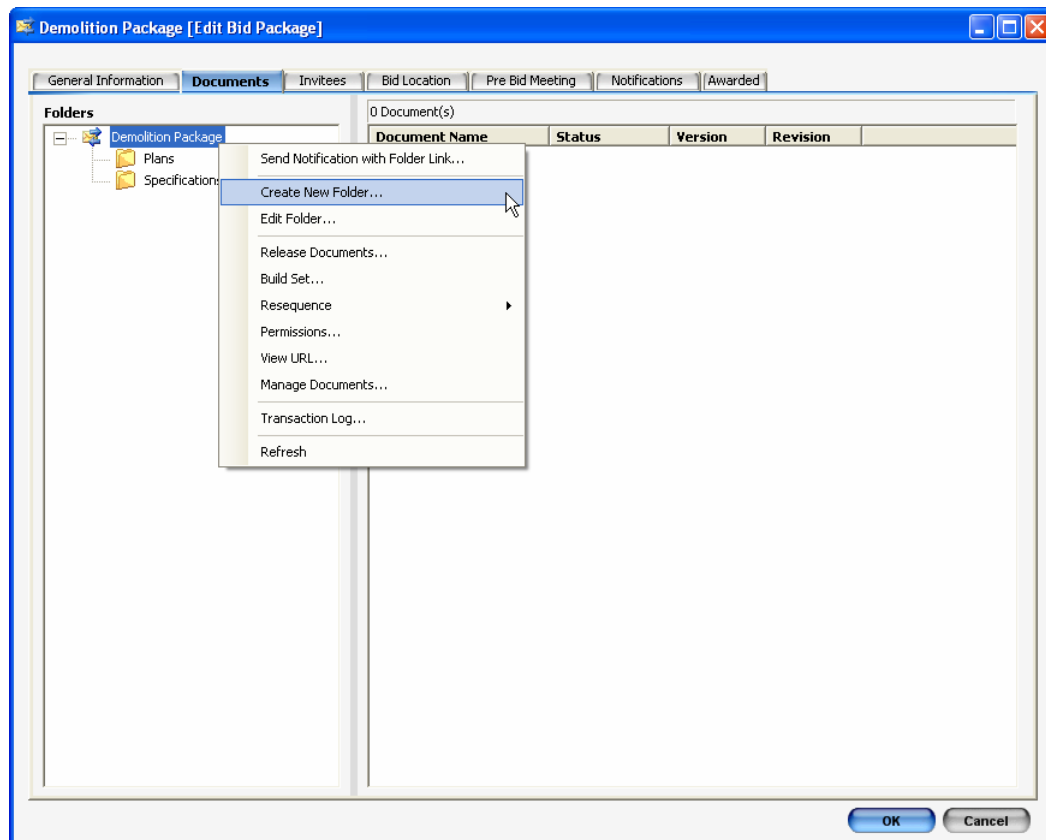
Bidder	Organization	Info	Bid Status	Bid Received
Bridger, Tanner	Consolidated Taylor Electrical	(W) (941) 948-8404 (F) (941) 948-8404 bridger@contayloelectricalco.com	Not Bidding	☐
Butterfill, Paul	Bay State Electrical and Cups	(W) (F) 456 W. Park St Boston, Massachusetts 11231 butterfill@baystateelectricalandcups.com	No Response	☐
Coldsmith, Doug	Renaultio T&T	(W) (272) 896-0675 (F) (272) 896-0675 coldsmith@renaultiott.com	Bidding	☐
Collett, Chuck	HFI Electrical Contracting	(W) (494) 588-0677 (F) (494) 588-0677 chuckc@hfi.com	No Response	☐
Dickinson, Emma	Tommy's Telephone	(W) (623) 916-0349 (F) (623) 916-0349 dickinson@tommystelco.com	Bidding	☐
Electric, Ed	EEC	(W) (440) 525-4614 (F) (440) 525-4614 edelectric@euclideancontractors.com	Not Bidding	☐
Electrician, Ernie	Complete Electricians	(W) (272) 896-0675 (F) (272) 896-0675 ernie@completeelectricians.com	Bidding	☐

and their current bid status.

Processing an Addenda

When an addenda is release, the addenda should be added to the bid package so that bidders can review the documents that have been changed.

PDM allows the project administrator to add a folder to the bid package documents that contains all of the addenda documents.



Right Click on the bid package folder and select **Create New Folder**.

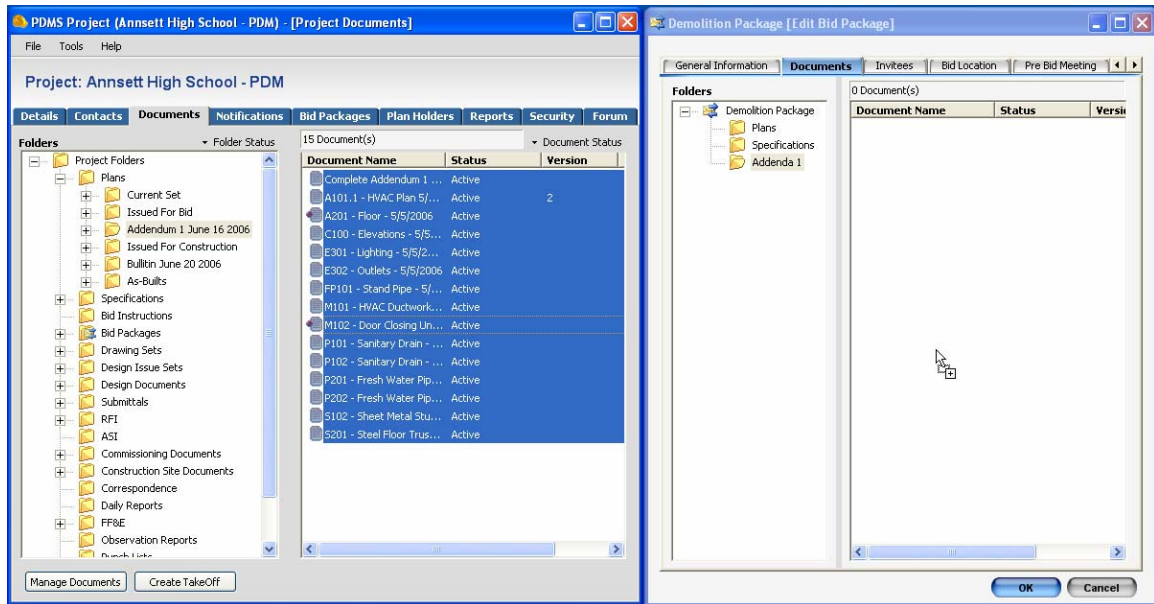
Enter the display name and the rest of the appropriate information.

The screenshot shows a 'New Folder' dialog box with a blue title bar and standard window controls. On the left, a sidebar titled 'Create New Folder' shows a three-step process: 'Step 1: Folder Information' (highlighted in blue), 'Step 2: Attributes', and 'Step 3: Review'. The main area is titled 'Description' and contains two sections. The 'Folder Information' section has a 'Display Name' field with the text 'Addenda 1' and a 'Description' field below it. The 'Release / Security Information' section includes a 'Status' dropdown menu set to 'Active', a 'Content Change Style' dropdown menu set to 'Static', and three date fields: 'Create Date', 'Release Date', and 'Expire Date', each with a calendar icon to its right. At the bottom right of the dialog are 'Next' and 'Cancel' buttons.

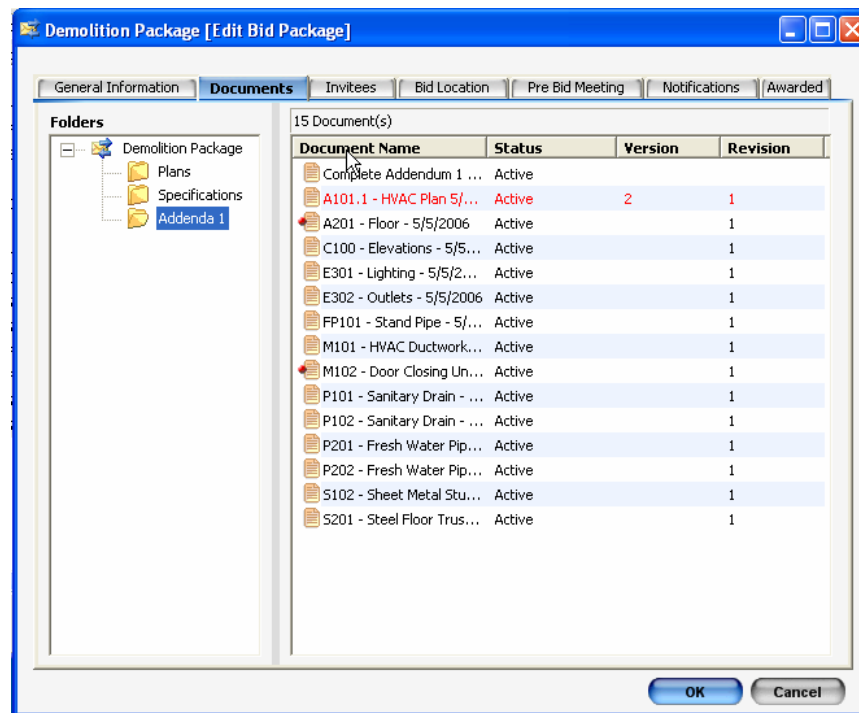
To add addendum documents to the bid package PDM allows the user to drag documents from the project documents window to the bid package window.

Select the Documents tab and Addenda Folder in the project details window.

Drag the appropriate addenda documents from the addenda folder on the project to the bid package's addenda folder.

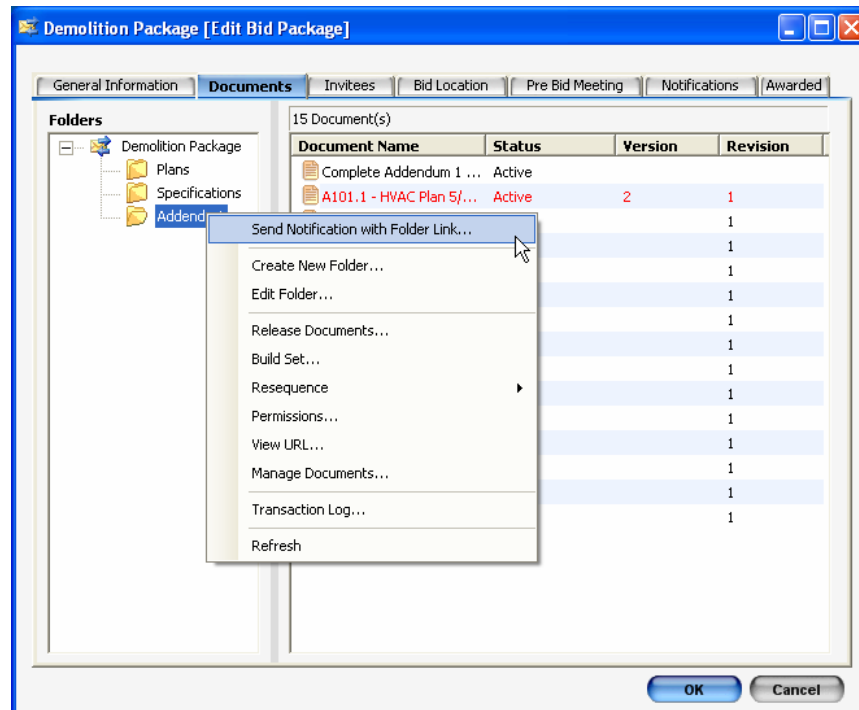


The documents will be displayed in the bid document addenda folder.



Once the addenda folder has been created and populated, a notification of addenda should be sent to the bidders.

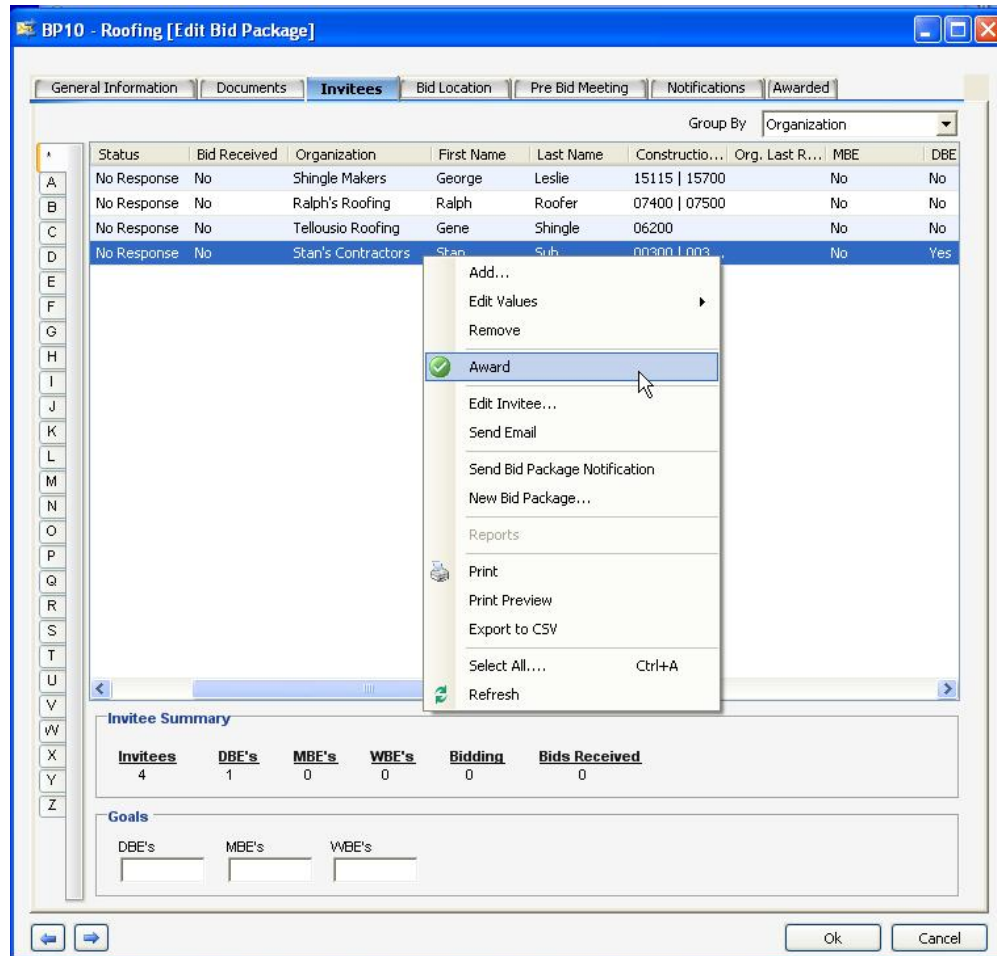
Right click on the Addend folder and select **Send Notification with Folder Link**.



Awarding the Bid Package

Once all of the subcontractor's bids have been received and a decision made, the bid package can be closed and awarded.

To award the bid package, go to the Invitees tab for the bid package. Right click on the contact to whom you want to award the bid and select **Award**. The bid is awarded to the contact.



To view the awarded bid, click the **Awarded** tab.

The screenshot shows a software window titled "BP10 - Roofing [Edit Bid Package]". It has a tabbed interface with the following tabs: "General Information", "Documents", "Invitees", "Bid Location", "Pre Bid Meeting", "Notifications", and "Awarded". The "Awarded" tab is currently selected. Inside this tab, there is a section titled "Award Information". This section contains two fields: "Organization Name (Readonly)" with the value "Stan's Contractors" and "Awarded Date" with a dropdown menu showing "7/26/2007". At the bottom of the window, there are navigation buttons (back and forward arrows) and "Ok" and "Cancel" buttons.

MANAGING USER SETTINGS

Managing My Account

You can update your contact and administrative information on the My Account tab. This allows you to maintain your own information without the involvement of a system administrator.

To manage your account, click the **My Account** tab.

PDMS (BETA Release - Not For Production) - [My Info]

File Tools Help

Projects Contacts Documents Notifications Bid Packages Products **My Account** News E-Store

Duplicate Key Organization And Location **Contact Information** Contact List Attributes Private

General Information

Prefix * First Name Middle * Last Name Suffix

Gary Campbell

* Display Name Title Occupation

Campbell, Gary Constructor

Contact Information

Country Type Apply Location Information

UNITED STATES (US) Unknown

Address

34103 Lakeshore Blvd

☐ Default Contact For Location

City State Zip

Cleveland 44095

County County Code Carrier Route

US

Work Phone Cell Phone Fax

(216) 743-0987 (216) 743-0988 (216) 743-0984

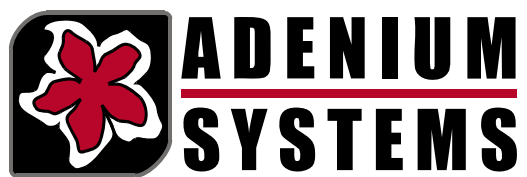
Email (read-only) Contact Method Time Zone

garygc@lakeconlineconstruction.com Email

Latitude Longitude

0.0 0.0

Enter or change any information on the **Duplicate Key**, **Organization and Location**, **Contact Information**, **Contact List**, **Attributes**, or **Private** tabs.



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